

U.S. Department  
of Transportation

United States  
Coast Guard



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# **BOATSWAIN'S MATE FIRST CLASS COURSE**

## **BM1**

**U. S. Coast Guard  
Pamphlet No. D10902  
(3/97)**



# **BOATSWAIN'S MATE FIRST CLASS**

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U. S. Coast Guard  
Training Center Yorktown (tn)  
Yorktown, VA. 23690-5000  
(757) 856-2373

QUESTIONS ABOUT THIS TEXT SHOULD BE  
ADDRESSED TO THE SUBJECT MATTER SPECIALIST  
FOR THE BOATSWAIN'S MATE RATING

## References

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### List of References

The following is a list of references you will be using throughout the Boatswain's Mate First Class Course.

Finance Center, Standard Operating Procedures, FINCENSTFINST M7000.1 (series)

Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series)

Supply Policy and Procedures Manual, COMDTINST M4400.19 (series)

Property Management Manual, COMDTINST M4500.5 (series)

Abstract of Operations Reports, COMDTINST M3123.7 (series)

Boat Crew Training Manual, COMDTINST M16114.9 (series)

Boat Crew Qualification Guide, COMDTINST M16114.11 (series)

Naval Engineering Manual, COMDTINST M9000.6 (series)

Cutter Training and Qualification Manual, COMDTINST M3502.4 (series)

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## Notice to Students

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<b>Purpose</b>	The purpose of this course is to provide you the skills necessary to perform at the boatswain's mate first class level.
<b>Important Note</b>	This text has been compiled for TRAINING ONLY. It should NOT be used in place of official directives or publications. The course information is current according to the references listed. You should, however, remember that it is YOUR responsibility to keep up with the latest professional information available for your rating. Current information is available from the Enlisted Qualifications Manual, COMDTINST M1414.8 (series).
<b>Course Content</b>	This course content is based on the requirements stated in the Enlisted Qualifications Manual, COMDTINST M1414.8 (series).
<b>Format</b>	<p>This course is a self-study, Personnel Qualification Standard (PQS) style course designed to put you in situations normally encountered on the job. It provides objectives, learning objectives, and a reading assignment from publications for each lesson as well as numerous self-quizzes and practice exercises.</p> <p>At the end of the pamphlet is a pamphlet review quiz designed to introduce you to multiple choice type questions similar to ones which may be asked on the end-of-course test.</p> <p>Additional text will occasionally be provided for a lesson reading assignment. The additional text is used to provide information that the reference doesn't cover or to better explain the reference material.</p> <p>Additional references will occasionally be provided. These references are not mandatory reading material to meet the objective of a lesson, but are intended to provide you a source of reference if you wish to find out more about a particular subject.</p>

## Notice to Students

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### **Learning Objectives**

Read the learning objectives before you begin reading the text. The objectives will guide you through the text and help you answer the questions in the self-quiz at the end of each lesson.

Complete each reading assignment to meet the lesson objective.

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### **Quizzes**

Each lesson has a self-quiz and each pamphlet has a pamphlet review quiz. You will find the answers to each quiz on the pages following the quiz. Included are the reference pages for the answers.

These self-quizzes are meant to check your comprehension of the material you covered. If you are having problems understanding a section, go through it again or ask someone for help. The pamphlet review quiz questions are samples of the type of questions you will find on the end-of-course-test (EOCT).

Make sure that you complete each self-quiz at 100%. If not completed at 100%, review the lesson objectives and reading assignment again.

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### **SWE Study Suggestion**

Servicewide exam questions for your rate and pay grade are based on the Professional and Military Requirements sections of the Enlisted Qualifications Manual, COMDTINST M1414.8 (series).

If you use the references from this text and consult the Enlisted Qualifications Manual, you should have good information for review when you prepare for your servicewide exam (SWE). We suggest that you make notes from the reading assignment and insert them with each lesson for future reference.

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## Structured Writing: A New Format

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### Definition

This course is written in a new style of writing called structured writing. Structured writing allows for the organization of large or complex units of information for easier reading and understanding.

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### Advantages

Structured writing enables you to:

- ◆ Scan information quickly
  - ◆ See main points instantly in the subheadings and marginal labels
  - ◆ See main text, clearly subdivided and containing supporting detail
- 

### Summary

Because correspondence courses play a major role in your training program, we hope you will enjoy this new format and that it will make learning easier.

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## Lesson 1

### INVENTORY OF PERSONAL PROPERTY

#### Overview

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##### Reading Assignment

This lesson is based on the following reading assignment:

- ◆ Property Management Manual, COMDTINST M4500.5 (series)
    - Chapter 2 Property Management
- 

##### Objective

This lesson will teach you how to:

- ◆ Conduct a physical inventory of personal property.

**Note:** To complete the objective, you must get a property report from the property custodian.

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##### Lesson Objectives

To successfully complete the objective, you must be able to:

- ◆ **IDENTIFY** the policy for Personal Property Management.
  - ◆ **DEFINE** the following:
    - Property management
    - Personal property
  - ◆ **IDENTIFY** the following:
    - Property officer
    - Property custodian
  - ◆ **IDENTIFY** the responsibilities of the property custodian.
  - ◆ **DETERMINE** the use of the Property Report.
  - ◆ **STATE** who must participate in all inventories.
  - ◆ **STATE** two situations when an inventory of property is required.
  - ◆ **STATE** what property must be marked for identification.
-

## Overview

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### Performance Qualification

This lesson covers the following performance qualification for BM1 from the Enlisted Qualification Manual:

♦ ADMINISTRATION 6.02

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### Note

In the past, many students had difficulty identifying the differences between the property officer and property custodian. Please ensure that you have a thorough understanding of the two before taking any quiz or test.

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## Lesson #1 Self-Quiz

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1. Each Coast Guard unit must maintain an effective property accountability and control system in accordance with the \_\_\_\_\_.
    - A. District SOP
    - B. CG Regulations Manual
    - C. Property Management Manual
    - D. Property Policy and Procedures Manual
  2. What is property management?
  3. Tangible property including artwork, models, and artifacts is \_\_\_\_\_.
  4. Who is responsible for maintaining accountability and control of property within a specified area?
    - A. Property officer
    - B. Property custodian
    - C. Operations officer
    - D. Ordnance officer
  5. Who is responsible for the custodial control of property within a specified custodial area?
    - A. Property officer
    - B. Property custodian
    - C. Operations officer
    - D. Ordnance officer
  6. Mark the responsibilities that pertain to the property custodian with an X.  
  
\_\_\_\_\_ Initiate documents affecting the accountability of property  
  
\_\_\_\_\_ Ensure the prompt submission of survey reports for lost, damaged, or destroyed property  
  
\_\_\_\_\_ Ensure that physical inventories are taken  
  
\_\_\_\_\_ Ensure that property is used only for official purposes  
  
\_\_\_\_\_ Ensure that survey reports for lost, damaged, or destroyed property are promptly prepared and processed  
  
\_\_\_\_\_ Assist in physical inventories
-

## Lesson #1 Self-Quiz

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7. The Property Report is the unit's property record for \_\_\_\_\_.
    - A. electronic equipment
    - B. small boats
    - C. GP property
    - D. vessels
  8. All inventories must have an \_\_\_\_\_ present.
  9. List two situations when an inventory of property is required.
    - a.
    - b.
  10. Which type of property must be marked for identification?
-



## Answers to Lesson #1 Self-Quiz

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Question	Answer
1	C
2	The effective control of the procurement, use safekeeping, and disposal of property
3	personal property
4	A
5	B
6	Initiate documents affecting the accountability of property  Ensure the prompt submission of survey reports for lost, damaged, or destroyed property  Ensure that property is used only for official purposes  Assist in physical inventories
7	C
8	independent person
9	Upon relief of the custodian and/or 1 year from last inventory
10	Coast Guard owned reportable property

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## Lesson 2

### AUTOMATED REQUISITION MANAGEMENT SYSTEM (ARMS)

#### Overview

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##### Reading Assignment

This lesson is based on the following reading assignments:

- ◆ Supply Policy and Procedures Manual, COMDTINST M4400.19 (series)
    - Chapter 4 Material Acquisition/Requisitioning/Receipts
  - ◆ Finance Center, Standard Operating Procedures FINCENSTFINST M7000.1 (series)
    - Chapter 12 E Supply/Requisition Type Transactions
  - ◆ Added text
- 

##### Objective

This lesson will teach you how to:

- ◆ Order supplies for a department/division utilizing documents in the ARMS program.
- 

##### Lesson Objectives

To successfully complete the objective, you must be able to:

- ◆ **STATE** why the Federal Catalog System was developed.
  - ◆ **IDENTIFY** the abbreviations of a National Stock Number (NSN).
  - ◆ **LABEL** the parts of a National Stock Number.
  - ◆ **LIST** at least three supply source references.
  - ◆ **STATE** the two primary forms used to requisition stock-numbered material using the ARMS program.
  - ◆ **STATE** the three uses of the SF-344.
  - ◆ **STATE** the purpose of the Surf Requisition Log (CG-4940).
  - ◆ **COMPLETE** a sample SF-344.
  - ◆ **COMPLETE** a sample Surf Requisition Log.
-

## Overview

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### **Additional References**

- ◆ The General Services Administration (GSA) Supply Catalog
  - ◆ The Afloat Shopping Guide (ASG) (NAVSUP-4400)
  - ◆ ARMS Manual, COMDTINST M4400.15 (series)
-

## Federal Supply System Sources

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### Introduction

You will find current, accurately priced items in the following three Federal Supply System sources:

- ◆ General Services Administration (GSA) Supply Catalog
- ◆ Afloat Shopping Guide (ASG)
- ◆ FEDLOG

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### (GSA) Catalog

The General Services Administration (GSA) Supply Catalog is one of the best sources for general housekeeping supplies, office supplies, furniture, and small common tools. To understand how to use the GSA Supply Catalog, you should read (Introduction HOW-TO) of the catalog.

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### (ASG)

The Afloat Shopping Guide (ASG) (NAVSUP - 4400) is a five part publication used to assist requisitioners in identifying common items of supply used on cutters and some shore units. For "how to" instructions read pages II and III just inside the ASG front cover.

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### FEDLOG

Federal Logistics Data (FEDLOG) is a basic four (4) disk configuration. The information contained on the disks include: Master Cross Reference List (MCRL), Commercial and Government Entity (CAGE), and Federal Supply Class (FSC) identification list.

Coast Guard units will use FEDLOG to retrieve the following information: Management Data, Part Number information, Supplier or CAGE information, Freight information, and Characteristic information.

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### Note

These are not the ONLY sources available to you. Specific supplies (including stock numbers) may also be identified in certain technical publications and manuals such as CALMS, BOSS, etc. whose listings are limited and job specific.

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## Forms

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### Introduction

There are two primary forms used to requisition stock-numbered material through the ARMS program: the SF-344 and the CG-4940 SURF Requisition Log. Either form can be used depending on command preference.

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### SF-344

The SF-344 is a form that can be used to requisition stock system supplies from your local supply office. The SF-344 has been restricted to local use only; it is not to be submitted to outside sources.

The FINCEN SOP, FINCENSTFINST M7000.1 (series), has an example of how to fill out the form.

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### CG-4940

The CG-4940 is a form used by most Coast Guard units to requisition stock system supplies. The form allows for complete tracking of the item from initial obligation amounts to actual cost.

The FINCEN SOP, FINCENSTFINST M7000.1 (series), has an example of how to fill out the form.

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### Note

With the introduction of STAR and CM-PLUS, many units are ordering and tracking supplies electronically.

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## Lesson #2 Self-Quiz

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1. Why was the Federal Catalog System developed?
2. Match the National Stock Number information in column A with the abbreviation that applies to it in column B. Abbreviations may be used more than once.

### Column A

- \_\_\_\_\_ 1. Series of nine numbers
- \_\_\_\_\_ 2. Four digit coding structure
- \_\_\_\_\_ 3. Contains the FSC & NIIN numbers
- \_\_\_\_\_ 4. Two digits identify the group and two digits identify the class within the group
- \_\_\_\_\_ 5. Usually the country which assigned the NIIN

### Column B

- a. NSN
- b. NIIN
- c. FSC
- d. DIDS
- e. NCB
- f. DLSC

3. Label the highlighted part of the NSN on the lines provided:

8010 - 01 - 625 - 8211 \_\_\_\_\_

8010 - 01 - 625 - 8211 \_\_\_\_\_

8010 - 01 - 625 - 8211 \_\_\_\_\_

8010 - 01 - 625 - 8211 \_\_\_\_\_

8010 - 01 - 625 - 8211 \_\_\_\_\_

## Lesson #2 Self-Quiz

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4. List three supply source references you can use to locate supplies you need to order.
  - a.
  - b.
  - c.
5. What are the two primary forms used to requisition stock-numbered material using the ARMS program?
  - a.
  - b.
6. List three uses of the SF-344.
  - a.
  - b.
  - c.
7. State the purpose of the Surf Requisition Log.

Using the following information, complete questions 8 and 9 using the blank forms on the following page.

- ◆ Staples, Paper Fastener/ 7510-00-272-9662/ SOS or COG is JGG/ BX./ \$.43/ QTY. is 01/ Date: 01/20/98.
- ◆ Connector, Receptacle/ 5935-01-064-6831/ SOS or COG is S9E/ EA./ \$.38/ QTY. is 03/ Date: 01/20/98.

8. Complete a sample SF-344.
  9. Complete a sample Surf Requisition Log.
-



## Answers to Lesson #2 Self-Quiz

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Question	Answer
1	To provide positive and accurate identification of every item in the supply systems of all Federal agencies, both military and civilian.
2	1. a 2. b 3. a 4. c 5. e
3	Federal Supply Classifications (FSC) National Codification Bureau (NCB) National Item Identification Number (NIIN) Group Class
4	General Services Administration (GSA) Supply Catalog Afloat Shopping Guide (ASG) (NAVSUP-4400) FEDLOG
5	SF-344 Surf Requisition Log (CG-4960)
6	As an initial form for entering the MILSTRIP System for units not having access to ARMS When an approval must be obtained When funds authorization must be obtained
7	It is a multipurpose form used to record MILSTRIP transactions.
8	See completed SF-344 on next page
9	See completed Surf Requisition Log on next page

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## Lesson 3

### PROCUREMENT REQUEST (PR)

#### Overview

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##### Reading Assignment

This lesson is based on the following reading assignments:

- ◆ Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series)
    - Chapter 4 Open Market Purchasing Overview
    - Chapter 10 Special Procurement Items
  - ◆ Finance Center, Standard Operating Procedures (FINCEN SOP), FINCENSTFINST M7000.1 (series)
    - Chapter 12 D Purchases and Miscellaneous Document Types
  - ◆ Added text
- 

##### Objective

This lesson will teach you how to:

- ◆ Order supplies for a department/division utilizing a Procurement Request form (DOT F-4200.1.1).
- 

##### Lesson Objectives

To successfully complete the objective, you must be able to:

- ◆ **STATE** the purpose of the Procurement Request.
  - ◆ **STATE** who is authorized to submit a Procurement Request.
  - ◆ **IDENTIFY** what information is required on the Procurement Request.
  - ◆ **STATE** the source you use to determine when a hazardous material review is required on the Procurement Request.
  - ◆ **LIST** two references that contain information concerning the Procurement Request.
  - ◆ **STATE** where to find line-by-line instructions for processing the Procurement Request.
  - ◆ **COMPLETE** the Procurement Request form.
- 

##### Additional References

- ◆ Reverse side of the Procurement Request form.
-

## Overview

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### Performance Qualification

This lesson covers the following performance qualification for BM1 from the Enlisted Qualification Manual:

- ◆ ADMINISTRATION 6.04 (a)
- 

### Background Information

Any person in the Coast Guard can initiate and submit a PR for supplies or services; after all, the PR is simply a document identifying specific need(s). However, there is specific information that is helpful and even required to appear on the request. Even though literally anyone can initiate a PR, not everyone can be expected to know or have access to required information.

It is reasonable to assume that your duties as a BM1 will place you in a position to initiate procurements requests. Generally a need will be identified and then you must initiate a PR.

(Note: Keep in mind that there will probably be considerable differences between the **initiator** and the **authorized requestor** or **requisitioner** of a PR).

Also, someone else decides which procurement tool to use for the actual purchase (e.g., IMPAC, SF-44, etc.), so it's not necessary to specify this on the PR you initiate.

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### Form Instructions

Line-by-line instructions for processing the PR can be found on the back of the form.

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### Note

The PR is not required to initiate ALL types of procurements (e.g., IMPAC). Nevertheless, it is a good form for you to use (if allowed) to keep a paper trail when initiating any commercial procurement.

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## Overview

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### **Note on The FINCEN SOP**

The USCG Finance Center Standard Operating Procedures Manual is included as a reference in this course. It provides Coast Guard wide technical operating procedures for processing and recording financial transactions. The manual is tabbed for quick reference and the text is in an easy to read format.

The Procurement Request Form was updated in February 1994. The new Form DOT F 4200.1CG looks the same with the exception of the Accounting Data section, which was expanded. You will complete the new form using the instructions listed in the references and on page 2 of the new form.

A computerized version of the PR form can be found in the Coast Guard Forms Plus/JetForm library.

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## Lesson #3 Self-Quiz

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1. The Procurement Request is designed as \_\_\_\_\_.
  2. Who is authorized to submit or initiate a Procurement Request?
  3. Place an X before the information that is required on your Procurement Request.

___ accounting data	___ certification of funds
___ approval signature	___ source of supply
___ requestor's signature	___ type of request
___ purchase description	___ required delivery date
  4. Where will you find Table I of Federal Standard 313C to determine if a hazardous material coordinator's approval is required on the Procurement Request?
  5. List two references that contain information concerning the Procurement Request.
    - a.
    - b.
  6. Where will you find specific line-by-line instructions on completing the Procurement Request?
  7. Complete the Procurement Request (see instructions on next page).
-

## Lesson #3 Self-Quiz

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### Instructions for Self-Quiz Question 7

Prepare a Procurement Request using:

- ◆ Your reading assignment
  - ◆ Procurement Request Instruction Sheet
  - ◆ The information below
- 

### Order Information

You are directed to prepare a Procurement Request form to order items to repair a damaged storage building exterior wall from Nick & Jim's Lumber Co., P.O. Box 763-D, Gloucester, Virginia, 23061-1812, (804) 898-2373.

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### Material to Order

You will be ordering the following items:

- ◆ Plywood sheets                      (2) - 4' x 8', CDX grade, \$24.95 ea.
  - ◆ Studs                                      (4) - 2 x 4 x 8', \$2.75 ea.
  - ◆ Nails                                        5 lbs., # 20, \$2.00 per lb.
- 

### Other Necessary Information

You will need the following information to complete your PR:

- ◆ Person to contact: BM1 U. R. Knot
  - ◆ Originating office data: XPO
  - ◆ Procurement Request number: 21-98-904FAB001
  - ◆ This is a new request
  - ◆ Date required: 4 February 1998
  - ◆ Approving officials:                      (1) BMCM I. M. Conley  
    (2) BM1 U. R. Knot  
    both sign on Dec. 2, 1997
  - ◆ Destination:                                Officer In Charge  
    USCGC Point Taken (WPB-82362)  
    Yorktown, Va. 23690-5000
  - ◆ Accounting data: 2/F/801/136/30/0/AB/12345/2644
-

# Procurement Request Form

READ INSTRUCTIONS ON PAGE 2

PAGE 1 OF 2 PAGES

# PROCUREMENT REQUEST PROCESS RAPIDLY

DEPARTMENT OF TRANSPORTATION

PROCUREMENT REQUEST NO.

DATE RECEIVED

1. NAME, PHONE NUMBER, AND ROUTING SYMBOL OF PERSON TO CONTACT

3. ORIGINATING OFFICE DATA

4. ADDITIONAL INFORMATION (Suggested supply sources, security data, etc.)

2. TYPE OF REQUEST (Check one)

A ☐ NEW REQUEST

B ☐ CHANGE TO  
PENDING PR NO. \_\_\_\_\_

C ☐ MODIFICATION TO  
CONTRACT OR  
ORDER NO. \_\_\_\_\_

## 5. APPROVALS

6. CONSIGNEE AND DESTINATION

APPROVING OFFICIALS

ROUTING  
SYMBOL

DATE

INTERNAL ROUTING

(A)

(B)

(C)

INITIALS  
(D)

ROUTING SYMBOL  
(E)

(1) AUTHORIZED REQUISITIONER

(2) ACCOUNTING CERTIFICATION OFFICER

(3)

(4)

7. DATE(S) REQUIRED

8. GOVERNMENT FURNISHED PROPERTY

☐ YES ☐ NO

(If "YES" see par. 8 of  
Instructions on page 2.)

## 9. DESCRIPTION OF ITEMS OR SERVICES

ITEM  
NO.  
(A)

ITEM OR SERVICE (Include Specifications and Special Instructions)  
(B)

QTY  
(C)

UNIT  
(D)

ESTIMATED COST

UNIT  
(E)

AMOUNT  
(F)

## 10. ACCOUNTING DATA

SYSTEMS DATA

CHECK APPLICABLE QUARTER

☐ 1ST

☐ 2ND

☐ 3RD

☐ 4TH

TOTAL

AGY  
DISY  
APPN  
CODE  
LIM  
CODE  
AFC  
CODE

ALIC

PROGRAM  
ELEMENT

COST  
CENTER

OBJECT  
CLASS

DOCUMENT NUMBER

TYPE

FY

P.R. NUMBER

SUFFIX

PROJECT

ACCOUNTING  
AMOUNT

2

0

21

2

0

21

2

0

21

**FORM DOT F 4200.1.2CG (Rev. 2-94)**  
PREVIOUS EDITIONS ARE OBSOLETE

# Procurement Request Instruction Sheet

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Page 2 of DOT F 4200.1.2CG (Rev. 2-94)

## INSTRUCTIONS FOR PREPARATION OF PROCUREMENT REQUEST (PR)

**GENERAL-** Leave upper righthand corner blank. These spaces are for procurement office use. Complete all applicable blanks. If additional space is needed, use blank paper or Form DOT F 4200.2CG, Procurement Request Continuation Sheet.

**ITEM 1-NAME, PHONE NUMBER, AND ROUTING SYMBOL** of person to contact concerning the request.

**ITEM 2-TYPE OF REQUEST**

A. Check "New Request" if this is an initial request. B. If this is a change to a pending PR, check box, and enter PR number assigned by procurement office. C. If PR is for modifying an existing order or contract, check box, and enter order or contract number assigned by procurement office.

**ITEM 3-ORIGINATING OFFICE DATA.** Enter any internal data needed by the office preparing the PR, such as internal PR number, project or task number, etc.

**ITEM 4-ADDITIONAL INFORMATION.** Use this space to indicate suggested sources of supply, any applicable security classification, or for other instructions or data. If the items or services are proposed to be obtained from only one source of supply, furnish a "sole source" justification with the PR.

**ITEM 5-APPROVALS.**

**COL. A-APPROVING OFFICIALS.** Enter typed name and title for approving officials as indicated below:

(1) Authorized Requisitioner. Signature of person authorized to approve request for procurement action.

(2) Accounting Certification Officer. Signature of accounting representative having authority to certify that funds are available for the procurement.

(3) and (4) For use as may be required by local instructions.

**COL. B-ROUTING SYMBOL.** Self-explanatory.

**COL. C-DATE.** Give date of approval.

**COL. D AND COL. E-INTERNAL ROUTING.** Use these blocks only if internal review and intermediate approvals are required by approving officials.

**ITEM 6-CONSIGNEE AND DESTINATION.** Enter the name of consignee and address location where requested items are to be delivered or services are to be performed. If shipments are to be made to more than one destination, enter the words "Multiple Destinations" in this block and attach a list of the consignee addresses where shipments are to be made.

**ITEM 7- DATE(S) REQUIRED.** Enter the date(s) that items are required. Do not use "as soon as possible" or similar terms. When the requested items and/or services are required sooner than the normal procurement lead-time would permit, a written justification should be attached to the PR. The justification should state why expedited handling is necessary and the probable results if the indicated delivery date(s) is not met.

**ITEM 8-GOVERNMENT FURNISHED PROPERTY.** If "Yes" is checked, describe each item to be furnished by the Government and state its acquisition cost (estimated if unattainable), and state the use to be made of the item(s) by the contractor.

**ITEM 9-DESCRIPTION OF ITEMS OR SERVICES.**

**COL. A-ITEM NO.** Enter item numbers in numerical sequence.

**COL. B-ITEM OR SERVICE.** Identify applicable specifications, drawings, and purchase descriptions, and attach a copy of each. Provide Federal Stock Numbers if known and manufacturer's part number, if applicable.

If a brand name or equal product, state the commercial brand name and model, and set forth those characteristics essential to Government needs. Furnish any special shipping and routing instructions, and any preservation, packaging, packing, and marking instructions.

Furnish any other instructions, such as inspection and testing requirements.

**COL. C-QUANTITY.** Enter quantity of each item requested.

**COL. D-UNIT.** The measure, such as "each" or "set".

**COL. E-ESTIMATED UNIT COST.** Use the most current price available, i.e., the reasonable "going market price," as may be obtainable from commercial catalogs, price lists, bulletins, reports, trade journals and the like. If the requested item or service has been previously procured, and no other more current pricing data is available, use last known purchase price.

**COL. F-ESTIMATED TOTAL COST.** Enter the total estimated cost for each item, and grand total cost

**ITEM 10-ACCOUNTING DATA.** Enter the appropriation(s) under which funds have been made available, and any other accounting data required. Reference Finance Center S.O.P. M7000.1.

## Answers to Lesson #3 Self-Quiz

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Question	Answer
1	a basic requesting document for most types of procurements
2	Anyone
3	Accounting data Certification of funds Source of supply Purchase description Required delivery date
4	Simplified Acquisition Procedures handbook COMDTINST M4200.13 (series) Enclosure (1)
5	a. Coast Guard, FINCEN (SOP) b. Simplified Acquisition Procedures Handbook
6	On the back of the Procurement Request form
7	See completed (PR) on next page

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# Answers to Lesson #3 Self-Quiz

READ INSTRUCTIONS ON PAGE 2

PAGE 1 OF 1 PAGES

DEPARTMENT OF TRANSPORTATION <b>PROCUREMENT REQUEST</b> <b>PROCESS RAPIDLY</b>						PROCUREMENT REQUEST NO. 21-98-904FAB001										
1. NAME, PHONE NUMBER, AND ROUTING SYMBOL OF PERSON TO CONTACT BM1 U.R. KNOT						2. TYPE OF REQUEST (Check one) A <input checked="" type="checkbox"/> NEW REQUEST B <input type="checkbox"/> CHANGE TO PENDING PR NO. _____ C <input type="checkbox"/> MODIFICATION TO CONTRACT OR ORDER NO. _____										
3. ORIGINATING OFFICE DATA XPO																
4. ADDITIONAL INFORMATION (Suggested supply sources, security data, etc.) Nick & Jim's Lumber Company P.O.Box 763-D Gloucester, Virginia 23061-1812 (804) 898-2373 POC: Larry																
5. APPROVALS																
APPROVING OFFICIALS (A)		ROUTING SYMBOL (B)	DATE (C)	INTERNAL ROUTING INITIALS (D) ROUTING SYMBOL (E)		6. CONSIGNEE AND DESTINATION Officer in Charge USCGC Point Taken Yorktown, Va. 23690-5000										
(1) AUTHORIZED REQUISITIONER BMCM I. M. Conley		OIC	12/2													
(2) ACCOUNTING CERTIFICATION OFFICER BM1 U.R. KNOT		XPO	12/2													
(3)																
(4)																
						7. DATE(S) REQUIRED 04 FEB 98										
						8. GOVERNMENT FURNISHED PROPERTY <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO (If "YES" see par. 8 of Instructions on page 2.)										
9. DESCRIPTION OF ITEMS OR SERVICES																
ITEM NO. (A)	ITEM OR SERVICE (Include Specifications and Special Instructions) (B)			QTY (C)	UNIT (D)	ESTIMATED COST										
						UNIT (E)	AMOUNT (F)									
1.	Plywood, CDX, 4X8 sheet			002	ea.	\$24.95	\$49.90									
2.	Stud, 8'			004	ea.	\$2.75	\$11.00									
3.	Nails, #20 (5lbs box)			005	als.	\$2.00	\$10.00									
10. ACCOUNTING DATA																
SYSTEMS DATA		CHECK APPLICABLE QUARTER				TOTAL										
		<input checked="" type="checkbox"/> 1ST <input type="checkbox"/> 2ND <input type="checkbox"/> 3RD <input type="checkbox"/> 4TH														
						\$70.90										
AGY	DSTY	APPN CODE	LIM CODE	AFC CODE	ALIC	PROGRAM ELEMENT	COST CENTER	OBJECT CLASS	DOCUMENT NUMBER		PROJECT	ACCOUNTING AMOUNT				
									TYPE	FY			P.R. NUMBER	SUFFIX		
		2	F	801	136	30	0	AB	12345	2644			21			
		2					0						21			
2					0				21							

FORM DOT F 4200.1.2CG (Rev. 2-94)  
 PREVIOUS EDITIONS ARE OBSOLETE

## Lesson 4

### STANDARD FORM 44 (SF-44)

#### Overview

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##### Reading Assignment

This lesson is based on the following reading assignments:

- ◆ Simplified Acquisitions Procedures Handbook, COMDTINST M4200.13 (series)
    - Chapter 5 Micro-Purchasing
    - Chapter 7 Acquisitions up to \$25,000
    - Chapter 11 Forms Preparation
  - ◆ Finance Center, Standard Operating Procedures, FINCENSTFINST M7000.1 (series)
    - Chapter 12 D Order-Invoice-Voucher, DAFIS Document Type: 22
  - ◆ Added text
- 

##### Objective

This lesson will teach you how to:

- ◆ Complete a Standard Form 44 (SF-44), Purchase Order-Invoice-Voucher for a department or division.
- 

##### Lesson Objectives

To successfully complete the objective, you must be able to:

- ◆ **STATE** when you are authorized to use the SF-44.
  - ◆ **STATE** where to locate instructions for completing and distributing the SF-44.
  - ◆ **STATE** four conditions that must be met before using the SF-44.
  - ◆ **DETERMINE** the monetary limitation of the SF-44 permitted by Federal Acquisition Regulations (FAR).
  - ◆ **STATE** the Coast Guard activities that use the SF-44.
  - ◆ **STATE** the restrictions for use of the SF-44.
  - ◆ **STATE** where SF-44s must be kept when not in use.
  - ◆ **COMPLETE** a sample SF-44.
-

## Overview

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### Background

The following text is added for your information because it is not adequately covered in the reading assignment.

---

### Use of the SF-44

The SF-44 was a popular and widely used form for on-the-spot, over-the-counter purchases of supplies and non-personal services. However, the form is now being rapidly phased out by the Coast Guard and is only authorized for use by isolated activities where no other method will satisfy your need.

---

### Isolated Activities

The following are examples of isolated activities:

- ◆ A small business in a rural area carrying necessary sole source supplies or services but not willing or unable to accept a credit card, etc.
  - ◆ Emergency non-personal services or supplies (e.g., diving repairs, welding, parts, etc.)
  - ◆ Grocery stores
- 

### Reminder

The SF-44 is included in your course because there are isolated activities where no other purchasing method, including the IMPAC card, would be appropriate.

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The following illustration shows a sample SF-44.

[illegible]

## Lesson #4 Self-Quiz

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1. You use the SF-44 for \_\_\_\_\_ purchases.
  2. Where will you find instructions for completing the Standard Form 44?
  3. List four conditions for using the Standard Form 44.
    - a.
    - b.
    - c.
    - d.
  4. What is the maximum dollar amount permitted by FAR when using the SF-44?
  5. You may use the SF-44 ONLY at \_\_\_\_\_.
  6. You can use the SF-44 to purchase fuel and oil for aircraft and vessels.  
\_\_\_\_ True  
\_\_\_\_ False
  7. If the amount of purchase exceeds the authorized limitations of the SF-44, you would \_\_\_\_\_.
    - A. split the purchase and use two or more SF-44s on the same day
    - B. use two or more SF-44s on different days
    - C. make other purchase arrangements
    - D. exceed dollar limitation if supplies or services cannot otherwise be readily located
  8. Where should the SF-44s be kept when not in use?
  9. Complete the SF-44 (see instructions on next page).
-

## Lesson #4 Self-Quiz

---

### Instructions for Self-Quiz Question 9

Prepare an SF-44 using:

- ◆ Your reading assignment
  - ◆ The information below
- 

### Order Information

You are directed to prepare an SF-44 form to repair a damaged storage building exterior wall from Dave & John's Lumber Co., P.O. Box 763-D, Gloucester, Virginia, 23061-1812, (757) 898-2373.

---

### Material To Order

You will be picking up the following items:

- ◆ Plywood sheets                      (2) - 4' x 8', CDX grade, \$24.95 ea.
  - ◆ Studs                                      (4) - 2 x 4 x 8', \$2.75 ea.
  - ◆ Nails                                      5 lbs., # 20, \$2.00 per lb.
- 

### Other Necessary Information

You will need the following information to complete your SF-44:

- ◆ Net Discount Terms:                      30 days
  - ◆ Received by:                                      SS2 I. M. Chef
  - ◆ Seller:    Manager D. M. Morrison
  - ◆ Order number:                                      2297-417-QAB001
  - ◆ Date required:                                      4 February 1998
  - ◆ Approving official:                                      BMCM John Foster
  - ◆ Destination:                                      Officer In Charge  
USCGC Point Taken (WPB-82362)  
Yorktown, Va. 23690-5000
  - ◆ Accounting data:                                      2/Q/801/175/30/0/AB/12345/2676
-

## Lesson #4 Self-Quiz

9. Complete this SF-44.

U.S. GOVERNMENT PURCHASE ORDER—INVOICE—VOUCHER							
DATE OF ORDER		ORDER NO.					
PRINT NAME AND ADDRESS OF SELLER (Number, Street, City, and State)							
FURNISH SUPPLIES OR SERVICES TO (Name and Address)							
P A Y E R				SUPPLIES OR SERVICES	QUANTITY	UNIT PRICE	AMOUNT
AGENCY NAME AND BILLING ADDRESS						TOTAL	
P A Y E R						DISCOUNT TERMS	
						DATE INVOICE RECEIVED	
ORDERED BY (Signature and Title)							
PURPOSE AND ACCOUNTING DATA							
PURCHASER — <i>To sign below for over-the-counter receipt of items</i>							
RECEIVED BY						DATE	
SELLER — <i>Please read instructions on Copy 2</i>							
<input type="checkbox"/> Payment Received \$				<input type="checkbox"/> Payment Requested \$			
NO FURTHER INVOICE NEED BE SUBMITTED							
SELLER						DATE	
I certify that this account is correct and proper for payment in the amount of \$						DIFFERENCES	
(Authorized Certifying Officer)						ACCOUNT VARIFIED	
						CORRECT FOR	
PAID BY CASH		DATE PAID		VOUCHER NO.			
PLEASE INCLUDE ZIP CODE		1. SELLERS INVOICE (See instructions on Copy 2)		STANDARD FORM (REV 10-43) PRESCRIBED BY GSA FAR (48 CFR) 53.21 XIC			

## Answers to Lesson #4 Self-Quiz

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Question	Answer
1	on-the-spot, over the counter purchases
2	Instructions are included in each book of forms
3	Purchase does not exceed \$2,500 Supplies or services are immediately available ONLY one delivery or pickup and one payment (on the spot) Regulatory requirements fulfilled
4	\$2,500 (check with your contracting officer for local limitations)
5	isolated activities
6	True
7	C
8	Under lock and key
9	See completed SF-44 on next page

---

## Answers to Lesson #4 Self-Quiz

9.

U.S. GOVERNMENT PURCHASE ORDER-INVOICE-VOUCHER			
DATE OF ORDER 04 FEB 1997		ORDER NO 2297-417-QAB001	
PRINT NAME AND ADDRESS OF SELLER (Name, Street, City, and State) Dave & John's Lumber Co. P.O. Box 763-D Gloucester, Va. 23061-1812			
FURNISH SUPPLIES OR SERVICES TO (Name and Address) P Officer In Charge USCGC Point Taken (WPB-82362) Gloucester, Va. 23061			
SUPPLIES OR SERVICES	QUANTITY	UNIT PRICE	AMOUNT
Plywood Sheet, CDX	2ea.	24.95	49.90
Studs	4ea.	2.75	11.00
Nails, 5 lbs.	5lbs.	2.00	10.00
AGENCY NAME AND BILLING ADDRESS Commercial Invoices USCG Finance Center P.O. Box 4115 CHESAPEAKE, VA 23327-4115		TOTAL \$70.90 DISCOUNT TERMS Net 30 Days DATE INVOICE RECEIVED	
ORDERED BY (Signature and Title) John Foster, BMCM, USCG			
PURPOSE AND ACCOUNTING DATA PURPOSE LISTED 2/Q/701/175/30/0/AB/12345/2676			
PURCHASER -- <i>See sign below for over-the-counter receipt of items</i>			
RECEIVED BY J. M. Chef		DATE 04 FEB 97	
TITLE SS2, USCG			
SELLER -- <i>Please read instructions on Copy 2</i>			
<input type="checkbox"/> Payment Received \$		<input checked="" type="checkbox"/> Payment Requested \$ \$70.90	
NO FURTHER INVOICE NEED BE SUBMITTED			
SELLER BY David M. Morrison, Mgr		DATE 04 FEB 97	
I certify that this account is correct and proper for payment in the amount of \$		DIFFERENCES	
(Authorized Certifying Officer)		ACCOUNT VERIFIED CORRECT FOR	
PAID BY CASH OR		DATE PAID	VOUCHER NO.
PLEASE INCLUDE ZIP CODE		1. SELLER'S INVOICE (See instructions on Copy 2)	
STANDARD FORM (REV 10-43) PRESCRIBED BY GSA FAR (48 CFR) 53.21 XIC			

## Lesson 5

### GOVERNMENTWIDE COMMERCIAL PURCHASE CARD (IMPAC)

#### Overview

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##### Reading Assignment

This lesson is based on the following reading assignments:

- ◆ Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series)
    - Chapter 4 Open Market Purchasing Overview
    - Chapter 5 Micro-Purchasing
    - Chapter 7 Acquisitions Up To \$25,000
  - ◆ Added text
- 

##### Objectives

This lesson will teach you how to:

- ◆ Order supplies for a department/division utilizing the Governmentwide Commercial Purchase Card (IMPAC).
  - ◆ Verify the monthly Governmentwide Commercial Purchase Card (IMPAC) Statement of Account (SOA).
- 

##### Lesson Objectives

To successfully complete the objective, you must be able to:

- ◆ **IDENTIFY** which small purchase methods CAN be replaced by the IMPAC card.
  - ◆ **LIST** the two types of IMPAC cardholders.
  - ◆ **LIST** the two types of authorization letters required for an IMPAC card user attached to a small boat station, cutter, or aircraft.
  - ◆ **STATE** what authorization letter should be carried by an authorized IMPAC card user attached to a station, cutter, or aircraft.
  - ◆ **LIST** at least three things you should consider before making a commercial purchase with an IMPAC card.
  - ◆ **STATE** the security measure for an IMPAC card that is not being used.
  - ◆ **STATE** what the IMPAC card MUST NOT be used for.
  - ◆ **LIST** the three steps used to verify a monthly Statement of Account (SOA).
-

## Overview

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### Additional References

- ◆ Finance Center, Standard Operating Procedures (FINCEN SOP), FINCENSTFINST M7000.1, (IMPAC)
  - ◆ Bank Card instructions
  - ◆ District/Group/Unit SOP
- 

### Performance Qualification

This lesson covers the following performance qualification for BM1 from the Enlisted Qualification Manual:

- ◆ ADMINISTRATION 6.04 (c)
  - ◆ ADMINISTRATION 6.05
- 

### Clarification for the IMPAC User

If you use an IMPAC card at stations, cutters, or aircraft, you may or may not be a warranted or non-warranted cardholder. Warranted and non-warranted cardholders will have their names on the cards, whereas a person only authorized to use the card will not.

If you are an authorized user of a warranted or non-warranted cardholder's card, the card will have the name of the officer-in-charge/CO etc., the unit name, and the unit OPFAC number on the card. That cardholder will have to delegate to you and other users the authority to use the card. In essence the cardholder is saying "I am giving you permission to use the card I have been assigned," and this will be accomplished with a signature authority letter. In addition, the head of the contracting office or the contracting officer will issue you a delegation of authority letter.

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### Paper Trail Hints

The reference tells you that you do not have to submit a Procurement Request to initiate a purchase with the IMPAC card. Whatever your command chooses to use, you still will need some sort of documentation for the paper trail.

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## Overview

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### Note

This lesson deals with the references listed. The references provide basic guidelines for IMPAC card use. Policy and procedures governing the card's use may differ from activity to activity. It is important that you the cardholder/user understand what responsibilities you have.

Remember, you must know your local policies and procedures concerning IMPAC.

---

## Lesson #5 Self-Quiz

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1. Place an X beside the small purchase methods which CAN be replaced by the IMPAC card.

\_\_\_\_\_ SF-44

\_\_\_\_\_ purchase/delivery orders

\_\_\_\_\_ BPA

\_\_\_\_\_ SF-149 (U.S. Government Natl. Credit Card)

\_\_\_\_\_ Impress Funds

2. List the two types of IMPAC cardholders.
3. List the two types of authorization letters required for an IMPAC card USER at a small boat station, cutter, or aircraft when the card is issued as a unit card.
- a.
- b.
4. What authorization letter should you carry with you when using an IMPAC card that is not specifically assigned to you?
5. List at least three considerations that the IMPAC card user should review before making a commercial purchase.
- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
6. State the security measure for an IMPAC card that is not being used.
-

## Lesson #5 Self-Quiz

---

7. State what the IMPAC card MUST NOT be used for.
  
  8. List the three steps used to verify the monthly Statement of Account (SOA).
    - a. \_\_\_\_\_
    - b. \_\_\_\_\_
    - c. \_\_\_\_\_
-

## Answers to Lesson #5 Self-Quiz

---

Question	Answer
1	SF-44 Purchase/delivery orders BPAs Impress Funds
2	a. Non-warranted cardholders b. Warranted cardholders
3	a. authorization letter (signed by the cardholder) b. delegation of procurement authority (signed by the head of the contracting activity or contracting officer)
4	Authorization letter (signed by the cardholder)
5	a. required Government sources b. competition and small business requirements c. the card's single purchase limit d. construction restrictions
6	It should be locked in a secure location
7	This card must not be used for cash transactions nor personal purchases
8	a. review the SOA for accuracy b. attach all purchase files/reports to the SOA c. sign and forward to approving official

---

## Lesson 6

### ABSTRACT OF OPERATIONS BOAT REPORT

#### Overview

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##### Reading Assignment

This lesson is based on the following reading assignment:

- ◆ Abstract of Operations Reports, COMDTINST M3123.7 (series)
- 

##### Objective

This lesson will teach you how to:

- ◆ Prepare an Abstract of Operations Boat Report.
- 

##### Lesson Objectives

To successfully complete the objective, you must be able to:

- ◆ **STATE** the purposes of an Abstract of Operations Boat Report.
  - ◆ **IDENTIFY** when you prepare an Abstract of Operations Boat Report.
  - ◆ **DEFINE** the following:
    - Employment category
    - Missions
    - Sorties
    - Underway hours
    - Employment hours
    - Resource hours
    - Maintenance hours
    - Storage hours
    - Standby hours
  - ◆ **STATE** when explanatory remarks are required.
  - ◆ **STATE** which hours must equal the number of hours in that quarter when conducting an edit check.
  - ◆ **COMPLETE** a sample Abstract of Operations Boat Report (CG 3273B).
- 

##### Study Hints

Read chapter 1 for explanation of each employment category.

Read chapter 4 to become familiar with the Abstract of Operations Cutter Report.

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## Overview

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### **Performance Qualification**

This lesson covers the following performance qualification for BM1 from the Enlisted Qualification Manual:

- ◆ ADMINISTRATION 6.06
-

## Lesson #6 Self-Quiz

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1. The Abstract of Operations Boat Report is used for \_\_\_\_\_.
2. The Abstract of Operations Boat Report is prepared \_\_\_\_\_.
  - A. monthly
  - B. quarterly
  - C. semiannually
  - D. annually
3. Match the definitions in column A with the proper term in column B. Use each term once.

### Column A

- \_\_\_\_\_ 1. The purpose for which a resource is used.
- \_\_\_\_\_ 2. Number of times an employment category is benefited under different sets of orders.
- \_\_\_\_\_ 3. The deployment of a boat for the purpose of providing a service.
- \_\_\_\_\_ 4. Total elapsed time which begins when a boat gets underway and which ends when the boat secures.
- \_\_\_\_\_ 5. Total number of underway hours spent benefiting each employment category.
- \_\_\_\_\_ 6. Underway hours credited to each employment category which is benefited during a trip.
- \_\_\_\_\_ 7. All hours in which a boat is in scheduled or unscheduled maintenance.
- \_\_\_\_\_ 8. The number of hours during which the boat is not in maintenance and not available for use.
- \_\_\_\_\_ 9. The number of hours during which the boat is available for use, but the time does not fit into the resource, maintenance, and storage categories.

### Column B

- a. Standby hours
- b. Underway hours
- c. Storage hours
- d. Maintenance hours
- e. Missions
- f. Resource hours
- g. Employment category
- h. Sortie
- i. Employment hours
- j. Mission hours

## Lesson #6 Self-Quiz

---

4. Explanatory remarks are required any time hours are recorded in the \_\_\_\_\_ category.
5. The total hours in a quarter should equal the sum of the \_\_\_\_\_.
6. Using the following information which was compiled from your boat mission records, complete the sample Abstract of Operations Boat Report (CG 3273B) on the next page for the period ending 12/31/97.

Your unit is Coast Guard station I'm Here, OPFAC number 01-12345, boat number 41347.

**NOTE:** Your boat was underway once per mission.

<u>MISSION</u>	<u>UNDERWAY HOURS</u>
40 SAR cases	226
25 drug patrols	125
2 oil pollution cases	36
4 dependent cruises	20
10 operational training	50

Boat crew training was also conducted during all SAR cases.

Boat was down for 36 hours for engine problems.

Boat was pulled out of water for winter lay up 0800 Nov 15 thru end of quarter.

Maintenance was conducted during winter lay up from 0800 Dec 1 to 1600 Dec 20.

All other time boat was in B-0 status.

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## Lesson #6 Self-Quiz

PREVIOUS EDITION IS OBSOLETE



## Answers to Lesson #6 Self-Quiz

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Question	Answer
1	programming, budgetary purposes
2	B
3	1. g 2. e 3. h 4. b 5. i 6. f 7. d 8. c 9. a
4	miscellaneous
5	resource, storage, maintenance, and standby hours
6	see completed CG-3273B on next page

---

## Answers to Lesson #6 Self-Quiz

DEPARTMENT OF TRANSPORTATION U.S. COAST GUARD CG-3273B (Rev. 9-92)		Abstract of Operations				REPORTS CONTROL SYMBOL G-OP 2002	
<b>BOAT REPORT</b>							
<b>A. UNIT IDENTIFICATION</b>							
1. OPFAC NO.  01-12345		2. REPORTING UNIT CG STATION I'M HERE					
3. QUARTER ENDING  12/31/97		4. BOAT IDENTIFICATION (e.g., UTB 41372)  UTB 41347					
<b>B. UTILIZATION DATA</b>							<b>C. DATA SUMMARY</b>
EMPLOYMENT CATEGORY	MISSIONS	SORTIES	EMPLOYMENT HOURS	RESOURCE HOURS	MAINTENANCE HOURS		
1. MARINE INSP.					1. 500		
2. REC BOAT SAFE					STORAGE HOURS		
3. SAR	40	40	226	113	2. 656		
4. DOM ICE					STANDBY HOURS		
5. POLAR OPS					3. 595		
6. MSA					TOTAL HOURS ACCOUNTED FOR		
7. ELT FISH-DOM					4. 2208		
8. ELT FISH-FOR					TOTAL OPERATING HOURS FOR BOATS ASSIGNED TO CUTTERS ACCOUNTED FOR		
9. ELT SANCTS					5.		
10. ELT DRUGS-AIR							
11. ELT DRUGS-SURF	25	25	125	125			
12. ELT MIRGRANT							
13. ELT OTHER							
14. MILOPS-WAR							
15. MILOPS-PEACE							
16. MIL TRA							
17. MIL EX							
18. CADET/OC							
19. A TO N							
20. RAD NAV							
21. MEP OPS	2	2	36	36			
22. MEP ENFORCE							
23. MEP MARPOL							
24. PORT SAFE							
25. PORT SEC-MIL							
26. PORT SEC-OTHER							
27. COOP FED							
28. COOP STATE							
29. COOP LOCAL							
30. PUB AFFAIRS	4	4	20	20			
31. INTNATL AFFAIRS							
32. RESERVE							
33. BRIDGE							
34. MISC							
35. SPECIAL A							
36. SPECIAL B							
37. A TO N TRAIL							
38. SAR TRAIL							
39. OP TRA	50	10	276	163			
TOTALS	40. 121	41. 81	42. 683	43. 457			
<b>D. REMARKS</b> (continue on reverse or separate sheet if necessary)							
1.							
DATE		SIGNATURE OF COMMANDING OFFICER OR OFFICER IN CHARGE					

PREVIOUS EDITION IS OBSOLETE

## Lesson 7

### WEIGHT TEST OF POWER-DRIVEN CRANES AND BOOMS

#### Overview

---

##### Reading Assignment

This lesson is based on the following reading assignment:

- ◆ Naval Engineering Manual, COMDTINST M9000.6 (series)
- 

##### Objective

This lesson will teach you how to:

- ◆ Perform a weight test on weight handling equipment.
- 

##### Lesson Objectives

To successfully complete the objective, you must be able to:

- ◆ **DEFINE** the following:
    - Full rated capacity
    - Safe working load (SWL)
    - Test load
  - ◆ **LIST** the two technical manuals you would use for guidance with an inspection or overhaul of weight handling equipment and specifications development.
  - ◆ **DEFINE** the three levels of inspection:
    - First Level
    - Second Level
    - Third Level
  - ◆ **IDENTIFY** the testing requirements for power-driven cranes and boom weight tests.
  - ◆ **LIST** the test procedures for booms installed on side loading buoy tenders.
  - ◆ **LIST** the test procedures for WLIC lattice boom cranes.
  - ◆ **LIST** the requirements for test procedures conducted on canes and booms installed on barges.
  - ◆ **IDENTIFY** the preparation taken before conducting tests.
  - ◆ **LIST** the safety precautions that must be observed when conducting weight-handling equipment tests.
-

## Overview

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### Lesson Objectives (Continued)

- ◆ **DETERMINE** the components that must be examined during each application of the test load for signs of undue strain.
  - ◆ **STATE** where the results of the inspections and tests are recorded.
  - ◆ **DESCRIBE** the location of the label plate on weight handling equipment and the information required on the label.
  - ◆ **DETERMINE** what changes are allowed to weight handling equipment.
-

## Lesson #7 Self-Quiz

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1. The safe limit of the equipment's weight lifting and holding ability, with the maximum authorized number of parts in the main purchase, is the \_\_\_\_\_.
2. The maximum weight to be handled by the purchases with the authorized number of parts is the \_\_\_\_\_.
3. The special weights applied to the equipment under controlled conditions to verify the full rated capacity and working loads of the equipment is called \_\_\_\_\_.
4. List the two technical manuals you would use for guidance with an inspection and overhaul of weight handling equipment and specification development.
  - a.
  - b.
5. The level of inspection which is used to ascertain the safety of the rigging and other critical equipment parts that could result in loss of life or equipment damage if failure occurs is \_\_\_\_\_.
6. The level of inspection which is used to concurrently disassemble, inspect, and overhaul all major components whose performance or mechanical condition may have deteriorated is \_\_\_\_\_.
7. The level of inspection which is used to disassemble and overhaul all pneumatic and hydraulic components is \_\_\_\_\_.
8. Testing shall be performed on all power-driven cranes and booms when \_\_\_\_\_.
  - A. second level inspection is performed
  - B. fourth level inspection is performed
  - C. the engineering officer schedules the test
  - D. the weapons officer schedules the test
9. List the test procedure for booms installed on side loading buoy tenders.
10. List the test procedures for WLIC lattice boom cranes.

## Lesson #7 Self-Quiz

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11. List the requirements for test procedures conducted on cranes and booms installed on barges.
12. Number the steps for preparation of a load test in the sequence that you should perform them.
- \_\_\_\_\_ a. test the brake assemblies
  - \_\_\_\_\_ b. maintain a stable, intact stability
  - \_\_\_\_\_ c. perform the inspections and overhauls
  - \_\_\_\_\_ d. conduct a briefing with everyone involved
  - \_\_\_\_\_ e. rig all topping lifts, vangs, whips, and purchases
  - \_\_\_\_\_ f. test each purchase with 1.25 times the safe working load
  - \_\_\_\_\_ g. verify tests weights with a calibrated dynamometer or scale
13. What are the safety precautions that you must observe when conducting weight-handling equipment tests?
14. What are the components that must be examined during each application of the test load for signs of undue strain?
15. Where are the results of the inspections and tests recorded?
16. On weight handling equipment, what information is required on the label plate and where is the label plate located?
17. Place an X beside the changes allowed to weight handling equipment.
- \_\_\_\_\_ use fewer parts with approval from MLC
  - \_\_\_\_\_ method of securing a line to a cargo hook
  - \_\_\_\_\_ relocation of fittings
  - \_\_\_\_\_ redesign of attachments with G-ENE approval
  - \_\_\_\_\_ substitution of material
  - \_\_\_\_\_ welding on highly-stressed components with G-ENE approval
-

**NO TEXT THIS PAGE**

---

## Answers to Lesson #7 Self-Quiz

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Question	Answer
1	full rated capacity
2	safe working load (SWL)
3	test load
4	manufacturers' instruction book NSTM Chapter 571, 573, 583, 589, 613
5	first level inspection
6	second level inspection
7	third level inspection
8	A
9	<ol style="list-style-type: none"><li>1. Lift test weights from foremost area of buoy deck on ship's centerline.</li><li>2. Top boom until hook is 8ft from boom foot and top down to initial position.</li><li>3. Rotate boom until hook is near inboard side of bulwark. Top boom until weight is near after-most area of deck and top down to initial position.</li><li>4. Rotate boom until hook is near inboard side of opposite bulwark and repeat procedure, topping down until weight is centered on the buoy port.</li><li>5. Rotate boom outboard until center of the load (hook) is 6 feet outboard of the buoy port.</li><li>6. Raise, lower, and stop weight to ensure the proper operation of brakes.</li><li>7. Rotate load through buoy port until center of the load (hook) hangs 6 feet off opposite side and return to centerline.</li></ol>

---

## Answers to Lesson #7 Self Quiz

---

Question	Answer
10	<ol style="list-style-type: none"><li>1. Test loads shall be 1.25 times greater than the safe working load.</li><li>2. Test loads shall not exceed 1.25 times the safe working load at the corresponding outreach as shown in the load charts.</li><li>3. Winch drums must have at least five wraps of wire at maximum payout.</li></ol>
11	<ol style="list-style-type: none"><li>1. Test loads shall be 1.25 times greater than the safe working load.</li><li>2. Test loads shall not exceed 1.25 times the safe working load at the corresponding outreach as shown in the load charts.</li><li>3. Include rotation of the test load throughout a range that it is required to perform in service. The crane rotating machinery must be able to stop, start, and hold the crane at any angle within the service rotating range.</li><li>4. Include lifting, lowering , stopping, and holding of the test load by each crane winch.</li></ol>
12	<ol style="list-style-type: none"><li>a. 7</li><li>b. 4</li><li>c. 3</li><li>d. 1</li><li>e. 5</li><li>f. 6</li><li>g. 2</li></ol>
13	<ol style="list-style-type: none"><li>1. Conditions that would cause sudden application of test loads should be avoided.</li><li>2. Do not rotate the boom with test loads at boom topping angles greater than 60 degrees.</li><li>3. Dunnage shall be placed under test loads, and each load shall be kept as close to the deck as possible.</li><li>4. Annual tests must not result in a list of over 15 degrees or the immersion of the deck edge.</li><li>5. Preventer lines or cables with a breaking strength equal to or greater than the test load shall be rigged athwartships from the test load.</li></ol>

## Answers to Lesson #7 Self Quiz

---

Question	Answer
14	<ol style="list-style-type: none"><li>1. Kingpost and foundations</li><li>2. Attachments of purchases</li><li>3. Running rigging</li><li>4. Blocks, links, padeyes</li><li>5. Foundations</li><li>6. Structural supports</li></ol>
15	<ol style="list-style-type: none"><li>1. Cutter hull history</li><li>2. Boat record</li><li>3. In the pilothouse, the maximum list of the cutter</li><li>4. On the boom, the date of test will be stenciled</li></ol>
16	<ol style="list-style-type: none"><li>1. Installed on the boom</li><li>2. Date of test, safe working load, test weight used, and corresponding parts of the purchase</li></ol>
17	<p>use fewer parts with approval from MLC method of securing a line to a cargo hook redesign of attachments with G-ENE approval welding on highly-stressed components with G-ENE approval</p>

---

## Lesson 8

### WEIGHT TEST OF BOAT HOISTING EQUIPMENT

#### Overview

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##### Reading Assignment

This lesson is based on the following reading assignment:

- ◆ Naval Engineering Manual, COMDTINST M9000.6 (series)
    - Chapter 583 Life Rafts, Life Floats, and Boat Hoisting Equipment
- 

##### Objective

This lesson will teach you how to:

- ◆ Perform a weight test on unit boat hoisting equipment.
- 

##### Lesson Objectives

To successfully complete the objective, you must be able to:

- ◆ **DESCRIBE** the purpose of tests and inspections of boat hoisting equipment.
  - ◆ **IDENTIFY** the frequency of load testing for boat hoisting equipment maintained at shore facilities.
  - ◆ **IDENTIFY** the frequency of load testing for boat hoisting equipment maintained aboard ships.
  - ◆ **IDENTIFY** the frequency of visual inspections for boat hoisting equipment.
  - ◆ **IDENTIFY** the frequency of inspection for wire rope used on boat hoisting equipment.
  - ◆ **IDENTIFY** the conditions found during inspection of boat hoisting equipment which warrant replacement of wire rope.
  - ◆ **IDENTIFY** the purpose of placing one-half of the load weight forward and the other one-half aft during a load test of boat hoisting equipment.
  - ◆ **IDENTIFY** the percentage of the normal hoisting load weight that is used during a load test on boat hoisting equipment.
  - ◆ **IDENTIFY** the amount of time the boat with the test load will be suspended just above the water for a load test on boat hoisting equipment.
-

## Overview

---

### Lesson Objectives (Continued)

- ◆ **DETERMINE** when a unit will review the certification and test examination documentation ensuring that both lifting sling and lifting points have been examined, proof load tested, and determined fit for service life at the safe working load stated for a Rigid Inflatable Boat (RIB).
  - ◆ **IDENTIFY** the source of supply for RIB lifting slings.
  - ◆ **STATE** who is responsible for the test, inspections, and maintenance of weight handling equipment.
  - ◆ **LIST** the information recorded on the Boat Inspection Report for each test and inspection period.
  - ◆ **LIST** the safety precautions to observe during testing of boat weight handling equipment.
-

## Lesson #8 Self-Quiz

---

1. What is the purpose of tests and inspection of boat hoisting equipment?
  2. The frequency of load testing for boat hoisting equipment maintained at shore facilities is \_\_\_\_\_ months.
    - A. 12
    - B. 18
    - C. 24
    - D. 36
  3. The frequency of load testing for boat hoisting equipment maintained aboard ships is \_\_\_\_\_ months.
    - A. 12
    - B. 18
    - C. 24
    - D. 36
  4. What is the frequency of visual inspections for boat hoisting equipment?
    - A. Daily
    - B. Weekly
    - C. After each use
    - D. Prior to each use
  5. The frequency of inspection for wire rope used on boat hoisting equipment is \_\_\_\_\_ months.
    - A. 6
    - B. 12
    - C. 18
    - D. 24
-

## Lesson #8 Self-Quiz

---

6. Place an X beside the conditions found during inspection of boat hoisting equipment which warrant wire rope replacement.

<input type="checkbox"/> cuts	<input type="checkbox"/> dirt covered wire
<input type="checkbox"/> nicks	<input type="checkbox"/> abraded wires
<input type="checkbox"/> crushing	<input type="checkbox"/> heat damage
<input type="checkbox"/> worn wires	<input type="checkbox"/> bird caging
<input type="checkbox"/> painted wire	<input type="checkbox"/> distortion
<input type="checkbox"/> broken wires	<input type="checkbox"/> fraying
<input type="checkbox"/> corroded wires	<input type="checkbox"/> kinks

7. The purpose of placing one-half of the load weight forward and the other one-half aft during a load test of boat hoisting equipment is to \_\_\_\_\_.

A. minimize strain on the boat  
B. minimize strain on the sling  
C. balance the weight in the boat  
D. balance the weight on the sling

8. What percentage of the normal hoisting load weight is used when conducting a load test on boat hoisting equipment?

A. 100  
B. 125  
C. 150  
D. 175

9. During a load test on boat hoisting equipment, the boat with the test load is suspended just above the water for AT LEAST \_\_\_\_\_ minutes.

A. 5  
B. 10  
C. 15  
D. 20

---

## Lesson #8 Self-Quiz

---

10. When will a unit review the certification and test examination documentation to ensure that both lifting sling and lifting points have been examined, proof load tested, and determined fit for service life at the safe working load stated for a Rigid Inflatable Boat (RIB)?
    - A. Daily
    - B. Weekly
    - C. After each use
    - D. Prior to each use
  11. A unit must order new lifting slings for a RIB from \_\_\_\_\_.
    - A. GSA
    - B. MLC
    - C. ARMS
    - D. manufacturer
  12. Who is responsible for the tests, inspections, and maintenance of weight handling equipment?
  13. List the information recorded on the Boat Inspection Report for each test and inspection period.
  14. List the safety precautions to observe during testing of boat weight handling equipment.
-

## Answers to Lesson #8 Self-Quiz

---

Question	Answer
1	To establish the adequacy of the boat structure, davits, boat crane, rigging, slings, attachments, and hoisting equipment.
2	C
3	A
4	D
5	B
6	cuts nicks crushing worn wires broken wires corroded wires abraded wires heat damage bird caging distortion fraying kinks
7	A
8	C
9	B
10	D
11	D
12	Commanding officer or officer-in-charge
13	1. Date of test and inspection 2. Weight added to the boat 3. Total weight hoisted 4. Comments

## Answers to Lesson #8 Self-Quiz

---

Question	Answer
----------	--------

14

- |  |  |
|--|--|
|  | <ol style="list-style-type: none"><li>1. Avoid dynamic loading during the test</li><li>2. Keep the boat low to reduce damage if the boat drops</li><li>3. Do not test-hoist the boat with personnel aboard</li><li>4. Do not exceed the specific test weights</li><li>5. Use adequate sling length or suitable spreaders to avoid placing excessive stress on the hull</li></ol> |
|--|--|
-

## Lesson 9

### BOAT INSPECTION REPORT

#### Overview

---

##### Reading Assignment

This lesson is based on the following reading assignment:

- ◆ Naval Engineering Manual, COMDTINST M9000.6 (series)
    - Chapter 090 Inspections, Records, Reports, and Tests
  - ◆ Added text
- 

##### Objective

This lesson will teach you how to:

- ◆ Complete a Boat Inspection Report (CG-3022) for a boat less than 65 feet long.
- 

##### Lesson Objectives

To successfully complete the objective, you must be able to:

- ◆ **LIST** the vessels for which you must submit a Boat Inspection Report (CG-3022).
  - ◆ **DETERMINE** who schedules the regular detailed boat inspection for each boat.
  - ◆ **STATE** who is required to submit the Boat Inspection Report.
  - ◆ **STATE** when your unit is required to submit the report.
  - ◆ **LIST** the two conditions requiring comments from the commanding officer or officer-in-charge.
  - ◆ **STATE** the organization responsible for establishing the due dates, frequency of submittal, and interval of inspection for the Boat Inspection Report.
  - ◆ **COMPLETE** a sample CG-3022.
- 

##### Performance Qualification

This lesson covers the following performance qualification for BM1 from the Enlisted Qualification Manual:

- ◆ MAINTENANCE 6.02
- 

##### Example

- ◆ The following illustrations show an example of a completed Boat Inspection Report (CG-3022).
-

<b>DEPARTMENT OF TRANSPORTATION U. S. COAST GUARD CG-3022 (Rev. 1-98)</b>		<b>BOAT INSPECTION REPORT</b>				<b>DATE</b>  01 MAY 98					
REPORTING UNIT USCG STATION ANNAPOLIS			DECK (TYPE & SIGNATURE) Pete Lemieux		GRADE/RATE E-6/BM						
INTERMEDIATE COMMAND USCG GROUP BALTIMORE			ENGINEER (TYPE & SIGNATURE) Barry Groomes		GRADE/RATE E-6/MK						
BOAT NUMBER 41471	TYPE OF BOAT UTB	HIN	OPTIONAL (TYPE & SIGNATURE) Joe Williamson		GRADE/RATE E-6/MK						
<b>RECORDS INSPECTION</b>						YES	NO	N/A			
IS BOAT RECORD UP TO DATE AND IAW COMDTINST M9000.6 (SERIES) CHAPTER 90?						X					
IS DEMP UP TO DATE AND PERFORMED IAW APPLICABLE PMS?						X					
IF N/A, IS PERFORMANCE TEST COMPLETED?											
IS PMS UP TO DATE AND IAW APPLICABLE PMS MANUAL?						X					
IS QUARTERLY PMS REPORT SUBMITTED IAW M9000.6 (SERIES) CH 081?						X					
IS SPARE PARTS/ALLOWANCE PROGRAM ACTIVE?						X					
LAST BOTTOM PAINT DATE? 14 JUN 97 TYPE OF PAINT USED? AMMERAN 635 WAS LAST BOTTOM PAINTING: <input type="checkbox"/> PARTIAL HULL? <input checked="" type="checkbox"/> FULL HULL?											
LAST DRY DOCK AVAILABILITY DATE & LOCATION 15 MAY 1997 ISC PORTSMOUTH VA.											
<b>WATERBORNE INSPECTION (Get Underway and Operate Boat)</b>											
ENGINES		PORT (OR CENTER)		STARBOARD		REDUCTION GEARS		PORT (OR CENTER)		STARBOARD	
MAKE		Cummins		Cummins		MAKE		Twin Disc		Twin Disc	
MODEL		VT903M		VT903M		MODEL		MG-509		MG-509	
SERIAL NUMBER		10572701		10595262		SERIAL NUMBER		3D8695		5BN731	
DATE INSTALLED/ OVERHAULED		02Nov95		02Nov95		DATE INSTALLED/ OVERHAULED		02Nov95		21May96	
ENGINE HOURS		1554		1546		GEAR HOURS		1554		1378	
C O N D I T I O N	SATISFACTORY	X		X		C O N D I T I O N	SATISFACTORY	X		X	
	NEED REPAIR						NEED REPAIR				
	NEED OVERHAUL						NEED OVERHAUL				
						YES	NO	N/A			
IS/ARE SHAFT(S) IN ALIGNMENT IAW APPLICABLE MLC STANDARD SPECIFICATION OR MANUFACTURERS RECOMMENDATION?						X					
IS COOLING SYSTEM MAINTAINED IAW COMDTINST M9000.6 (SERIES) CHAPTER 233?						X					
ARE ALL FLEX HOSES MAINTAINED IAW COMDTINST M9000.6 (SERIES) CHAPTER 505?						X					
ARE WATER TIGHT BOUNDARIES TESTED & INSPECTED IAW NSTM 9880?						X					
ARE HOISTING PADS TESTED AND INSPECTED IAW COMDTINST M9000.6 (SERIES) CHAPTER 583?									X		
ARE LIFE RING LIGHTS & LIFE RINGS INSPECTED IAW COMDTINST M10470.10 (SERIES)?						X					
IS BOAT OUTFIT INSPECTED AND MAINTAINED IAW APPLICABLE TYPE MANUAL OR DISTRICT INSTRUCTION?						X					
IS INSIDE OF HULL INSPECTED IAW COMDTINST M9000.6 (SERIES) CHAPTER 079?						X					
DO CONTROLS OPERATE IAW APPLICABLE PMS OR MANUFACTURERS INSTRUCTIONS?						X					
ARE INSTRUMENTS RED LINED AND OPERATING IAW M9000 (SERIES) CHAPTER 233?						X					
DATE OF LAST LIFERAFT INSPECTION PERFORMED IAW M10470.10 (SERIES)?						25MAY97					
DATE OF LAST FUEL TANK CLEANING & INSPECTION PERFORMED IAW NSTM 541?						06Jun97					
DATE OF LAST COMPASS DEVIATION PERFORMED IAW NSTM 420?						14Dec97					
<b>INSPECTION WHILE HAULED OUT OF WATER</b>											
Check and Record Rudder Bushing Clearance ( <i>Maximum allowable clearance 1" and 2" rudder stock .050" and 3" stock .060"</i> )											
PORT (OR CENTER) CLEARANCE		.010		<input checked="" type="checkbox"/> SATISFACTORY		<input type="checkbox"/> UNSATISFACTORY					
STARBOARD CLEARANCE		.010		<input checked="" type="checkbox"/> SATISFACTORY		<input type="checkbox"/> UNSATISFACTORY					
Remove Propeller, Check and Record Propeller Shaft Runout at After end of Shaft ( <i>Maximum allowable runout .004"</i> )											
PORT (OR CENTER) SHAFT		.004		<input checked="" type="checkbox"/> SATISFACTORY		<input type="checkbox"/> UNSATISFACTORY					
STARBOARD SHAFT		.003		<input checked="" type="checkbox"/> SATISFACTORY		<input type="checkbox"/> UNSATISFACTORY					
				SAT	UNSAT					PORT/CENTER	STARBOARD
INSPECT OUTSIDE OF ENTIRE HULL (LIST ALL DAMAGES & DISCREPANCIES BELOW)				X		PROPELLER WEIGHT EXCLUDING OUTBOARD & I/O				47.5	48.5
INSPECT PROPELLER(S) (LIST ALL DAMAGE & DISCREPANCIES BELOW)				X							
DAMAGE & DISCREPANCIES: (ADDITIONAL COMMENTS ON REVERSE)											
None											

PREVIOUS EDITION IS OBSOLETE

## Check and Record Strut and Hull Cutless Bearing Clearances:

Maximum Allowable Clearances -- 1" Shaft diameter - .070"  
 1 - 1/2" Shaft diameter - .081"  
 1 - 3/4" Shaft diameter - .086"  
 2" Shaft diameter - .091"

PORT (OR CENTER)			
.010	TOP		
.005	LOOKING FWD	.005	STBD
.005	PORT	.005	STBD
.000	BOTTOM		
.010	TOP CLEARANCE	.000	BOTTOM CLEARANCE
.005	STBD CLEARANCE	.005	PORT CLEARANCE
TOTAL VERTICAL CLEARANCE		TOTAL HORIZONTAL CLEARANCE	
.010		.010	

DOES EITHER CLEARANCE EXCEED MAXIMUM ALLOWABLE LISTED ABOVE? ☐ Y ☒ N

STARBOARD			
.010	TOP		
.005	LOOKING FWD	.005	STBD
.005	PORT	.005	STBD
.000	BOTTOM		
.010	TOP CLEARANCE	.000	BOTTOM CLEARANCE
.005	STBD CLEARANCE	.005	PORT CLEARANCE
TOTAL VERTICAL CLEARANCE		TOTAL HORIZONTAL CLEARANCE	
.010		.010	

DOES EITHER CLEARANCE EXCEED MAXIMUM ALLOWABLE LISTED ABOVE? ☐ Y ☒ N

PORT (OR CENTER)			
.005	TOP		
.005	LOOKING FWD	.000	STBD
.005	PORT	.000	STBD
.005	BOTTOM		
.005	TOP CLEARANCE	.005	BOTTOM CLEARANCE
.000	STBD CLEARANCE	.005	PORT CLEARANCE
TOTAL VERTICAL CLEARANCE		TOTAL HORIZONTAL CLEARANCE	
.010		.005	

DOES EITHER CLEARANCE EXCEED MAXIMUM ALLOWABLE LISTED ABOVE? ☐ Y ☒ N

STARBOARD			
.010	TOP		
.002	LOOKING FWD	.004	STBD
.002	PORT	.004	STBD
.005	BOTTOM		
.010	TOP CLEARANCE	.005	BOTTOM CLEARANCE
.004	STBD CLEARANCE	.002	PORT CLEARANCE
TOTAL VERTICAL CLEARANCE		TOTAL HORIZONTAL CLEARANCE	
.015		.006	

DOES EITHER CLEARANCE EXCEED MAXIMUM ALLOWABLE LISTED ABOVE? ☐ Y ☒ N

LIST BOATALTS PENDING:  
 NONE

LIST BOATALTS COMPLETED SINCE LAST REPORT:  
 41UTB(A)A-96 41UTB(A)B-97-1  
 41UTB(A)B-98-1

LIST PENDING CSMPs:  
 NONE

## INSPECTION TEAM COMMENTS: (ADDITIONAL COMMENTS ON REVERSE)

The underwater coating system (Ammeran 635 Organatin) failed to prevent barnacle growth on the sea chest inlet cover and the bottom of skeg. The barnacle growth was very thick in these areas and minor on the rest of the hull. The inspection team found no damage to the underwater paint system which would explain the heavy growth.

(Signature)

## COMMANDING OFFICER/OFFICER IN CHARGE COMMENTS: (COMMENTS REQUIRED ON ALL UNSATISFACTORY ITEMS) (ADDITIONAL COMMENTS ON REVERSE)

(Signature)

INTERMEDIATE COMMANDER

☐ CONCUR

☐ DO NOT CONCUR

(Signature)

## Lesson #9 Self-Quiz

---

1. What vessels must your unit submit a Boat Inspection Report for?
  2. Place an X before the organizations or individuals which are required to schedule the regular detailed boat inspection for each boat.  

<input type="checkbox"/> group	<input type="checkbox"/> section
<input type="checkbox"/> station	<input type="checkbox"/> district commander
<input type="checkbox"/> Commandant	<input type="checkbox"/> Maintenance and Logistic Command
  3. Who is required to submit the Boat Inspection Report?
  4. Within how many days after completion of the boat inspection will the CG-3022 be submitted to the Maintenance and Logistic Command (MLC)?
  5. List two conditions requiring comments from the commanding officer or officer-in-charge.
    - a.
    - b.
  6. What organization will establish the due dates, frequency of submittal, and interval of inspection for the Boat Inspection Report (CG-3022)?
  7. Complete the CG-3022 (see instructions on next page).
-

## Lesson #9 Self-Quiz

---

### Instructions for Self-Quiz Question 7

- Prepare a CG-3022 using:
- ◆ Your reading assignment
  - ◆ The information below
- 

### Necessary Information

You will need the following information to complete your CG-3022:

- ◆ Reporting unit: USCG Station Barnegat, NJ
  - ◆ Intermediate command: USCG Group Cape May, NJ
  - ◆ Boat Number: 41360
  - ◆ Type of Boat: UTB
  - ◆ Inspectors: MKC R.W. Ritz  
MK1 M.R. Randall  
BM1 I.M. Knot
  - ◆ Date of inspection: 01 March 1998
  - ◆ Boat and engine records up-to-date: Yes
  - ◆ Is DEMP up-to-date and performed: Yes
  - ◆ Is PMS up-to-date: Yes
  - ◆ Is quarterly PMS report submitted: Yes
  - ◆ Is spare parts/allowance program active: Yes
  - ◆ Date last complete bottom painting: 18 Feb 97
  - ◆ Partial or full hull paint: Full
  - ◆ Type of paint used: Ammeran 635 Organtitin
  - ◆ Last dry dock availability date/location: 15 Jan 97 Group Cape May  
BMF
  - ◆ Make of both main engines: Cummins
  - ◆ Model of both main engines: VT903M
  - ◆ Serial Numbers: P-10572701 & S-10595262
  - ◆ Date Installed/Overhauled: 02 November 1995 Port
  - ◆ Date Installed/Overhauled: 04 May 1996 Starboard
  - ◆ Operating hours: 2554 Port
  - ◆ Operating hours: 1546 Starboard
  - ◆ Condition of both engines: Satisfactory
-

## Lesson #9 Self-Quiz

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<b>Necessary Information (Continued)</b>	♦ Reduction gears-make:	Twin Disc
	♦ Reduction gear model:	MG-509
	♦ Reduction gear serial numbers:	P-3D8696 S-5BN731
	♦ Reduction gear date installed:	P-02 Nov 95 S-04 May 96
	♦ Reduction gear hours:	P-2554 S-1546
	♦ Reduction gears condition:	P-Sat S-Sat
	♦ Is/are shafts in alignment IAW specs.:	Yes
	♦ Is cooling system maintained:	Yes
	♦ All flexible hoses maintained:	Yes
	♦ Watertight boundaries tested/inspected:	Yes
	♦ Hoisting pads:	N/A
	♦ Life ring and light:	Yes
	♦ Boat outfit maintained:	Yes
	♦ Inside of hull inspected:	Yes
	♦ Do controls operate IAW specs.:	Yes
	♦ Instruments redlined:	Yes
	♦ Date of last life raft inspection:	15 Feb 1997
	♦ Date last fuel tank cleaning:	12 Feb 1997
	♦ Date of last Compass Deviation Table:	15 Aug 97
	♦ Port rudder clearance:	.046 Satisfactory
	♦ Starboard rudder clearance:	.033 Satisfactory
	♦ Port propeller shaft runout:	.003 Satisfactory
	♦ Starboard propeller shaft runout:	.004 Satisfactory
	♦ Outside of hull:	Satisfactory
	♦ Propellers:	Satisfactory
	♦ Propeller weight:	P-48.5lbs S-47.5lbs
	♦ Damage & discrepancies:	None

---

## Lesson #9 Self-Quiz

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### Necessary Information (Continued)

- ◆ Strut Bearings
    - Port cutlass bearing clearances:
      - .015 Top
      - .010 Bottom
      - .025 Total
      - .010 Outboard
      - .010 Inboard
      - .020 Total
      - Satisfactory
    - Starboard cutlass bearing clearances:
      - .010 Top
      - .010 Bottom
      - .020 Total
      - .010 Outboard
      - .025 Inboard
      - .035 Total
      - Satisfactory
  - ◆ Hull Bearings
    - Port cutlass bearing clearances:
      - .010 Top
      - .004 Bottom
      - .014 Total
      - .006 Outboard
      - .006 Inboard
      - .012 Total
      - Satisfactory
    - Starboard cutlass bearing clearances:
      - .006 Top
      - .004 Bottom
      - .010 Total
      - .006 Outboard
      - .006 Inboard
      - .012 Total
      - Satisfactory
-

## Lesson #9 Self-Quiz

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### Necessary Information (Continued)

- ◆ List BOATALTs pending: 41UTB(A)-A-93
  - ◆ List BOATALTs Completed: None
  - ◆ List pending CSMPs: None
  - ◆ Inspection Team Comments:
    - Major overhaul completed on:  
Port fuel pump  
Starboard fuel pump  
Port turbocharger  
Starboard turbocharger
    - Stainless steel mufflers installed: Yes
    - Underwater body paint report:  
No damage  
Ammeran 635 Organatin
    - Discrepancies noted: None
  - ◆ Inspection team signature: BM1 I.M. Knot
  - ◆ Commanding officer's signature: M.J. Wilbert, LT, USCG
-



<b>DEPARTMENT OF TRANSPORTATION</b> U. S. COAST GUARD CG-3022 (Rev. 1-98)				<b>BOAT INSPECTION REPORT</b>				DATE			
REPORTING UNIT					DECK (TYPE & SIGNATURE)			GRADE/RATE			
INTERMEDIATE COMMAND					ENGINEER (TYPE & SIGNATURE)			GRADE/RATE			
BOAT NUMBER		TYPE OF BOAT		HIN	OPTIONAL (TYPE & SIGNATURE)			GRADE/RATE			
<b>RECORDS INSPECTION</b>								YES	NO	N/A	
IS BOAT RECORD UP TO DATE AND IAW COMDTINST M9000.6 (SERIES) CHAPTER 90?											
IS DEMP UP TO DATE AND PERFORMED IAW APPLICABLE PMS?											
IF N/A, IS PERFORMANCE TEST COMPLETED?											
IS PMS UP TO DATE AND IAW APPLICABLE PMS MANUAL?											
IS QUARTERLY PMS REPORT SUBMITTED IAW M9000.6 (SERIES) CH 081?											
IS SPARE PARTS/ALLOWANCE PROGRAM ACTIVE?											
LAST BOTTOM PAINT DATE?				TYPE OF PAINT USED?		WAS LAST BOTTOM PAINTING :		<input type="checkbox"/> PARTIAL HULL?	<input type="checkbox"/> FULL HULL?		
LAST DRY DOCK AVAILABILITY DATE & LOCATION											
<b>WATERBORNE INSPECTION (Get Underway and Operate Boat)</b>											
ENGINES		PORT (OR CENTER)		STARBOARD		REDUCTION GEARS		PORT (OR CENTER)		STARBOARD	
MAKE						MAKE					
MODEL						MODEL					
SERIAL NUMBER						SERIAL NUMBER					
DATE INSTALLED/ OVERHAUL						DATE INSTALLED/ OVERHAUL					
ENGINE HOURS						GEAR HOURS					
C O N D I T I O N	SATISFACTORY						C O N D I T I O N	SATISFACTORY			
	NEED REPAIR							NEED REPAIR			
	NEED OVERHAUL							NEED OVERHAUL			
								YES	NO	N/A	
IS/ARE SHAFT(S) IN ALIGNMENT IAW APPLICABLE MLC STANDARD SPECIFICATION OR MANUFACTURERS RECOMMENDATION?											
IS COOLING SYSTEM MAINTAINED IAW COMDTINST M9000.6 (SERIES) CHAPTER 233?											
ARE ALL FLEX HOSES MAINTAINED IAW COMDTINST M9000.6 (SERIES) CHAPTER 505?											
ARE WATER TIGHT BOUNDARIES TESTED & INSPECTED IAW NSTM 9880?											
ARE HOISTING PADS TESTED AND INSPECTED IAW COMDTINST M9000.6 (SERIES) CHAPTER 583?											
ARE LIFE RING LIGHTS & LIFE RINGS INSPECTED IAW COMDTINST M10470.10 (SERIES)?											
IS BOAT OUTFIT INSPECTED AND MAINTAINED IAW APPLICABLE TYPE MANUAL OR DISTRICT INSTRUCTION?											
IS INSIDE OF HULL INSPECTED IAW COMDTINST M9000.6 (SERIES) CHAPTER 079?											
DO CONTROLS OPERATE IAW APPLICABLE PMS OR MANUFACTURERS INSTRUCTIONS?											
ARE INSTRUMENTS RED LINED AND OPERATING IAW M9000 (SERIES) CHAPTER 233?											
DATE OF LAST LIFERAFT INSPECTION PERFORMED IAW M10470.10 (SERIES)?											
DATE OF LAST FUEL TANK CLEANING & INSPECTION PERFORMED IAW NSTM 541?											
DATE OF LAST COMPASS DEVIATION PERFORMED IAW NSTM 420?											
<b>INSPECTION WHILE HAULED OUT OF WATER</b>											
Check and Record Rudder Bushing Clearance ( <i>Maximum allowable clearance 1" and 2" rudder stock .050" and 3" stock .060"</i> )											
PORT (OR CENTER) CLEARANCE _____					<input type="checkbox"/> SATISFACTORY			<input type="checkbox"/> UNSATISFACTORY			
STARBOARD CLEARANCE _____					<input type="checkbox"/> SATISFACTORY			<input type="checkbox"/> UNSATISFACTORY			
Remove Propeller, Check and Record Propeller Shaft Runout at After end of Shaft ( <i>Maximum allowable runout .004"</i> )											
PORT (OR CENTER) SHAFT _____					<input type="checkbox"/> SATISFACTORY			<input type="checkbox"/> UNSATISFACTORY			
STARBOARD SHAFT _____					<input type="checkbox"/> SATISFACTORY			<input type="checkbox"/> UNSATISFACTORY			
				SAT	UNSAT				PORT/CENTER	STARBOARD	
INSPECT OUTSIDE OF ENTIRE HULL (LIST ALL DAMAGES & DISCREPANCIES BELOW).						PROPELLER WEIGHT EXCLUDING OUTBOARD & I/O					
INSPECT PROPELLER(S) (LIST ALL DAMAGE & DISCREPANCIES BELOW).											
DAMAGE & DISCREPANCIES: (ADDITIONAL COMMENTS ON REVERSE)											

PREVIOUS EDITION IS OBSOLETE

BOAT NUMBER:

Check and Record Strut and Hull Cutless Bearing Clearances:

Maximum Allowable Clearances -- 1" Shaft diameter - .070"  
 1 - 1/2" Shaft diameter - .081"  
 1 - 3/4" Shaft diameter - .086"  
 2" Shaft diameter - .091"

PORT (OR CENTER)		STRUT BEARINGS	STARBOARD																					
TOP  BOTTOM	<table style="width: 100%;"> <tr> <td>TOP CLEARANCE</td> <td>+</td> <td>BOTTOM CLEARANCE</td> <td>=</td> <td>TOTAL VERTICAL CLEARANCE</td> </tr> <tr> <td>STBD CLEARANCE</td> <td>+</td> <td>PORT CLEARANCE</td> <td>=</td> <td>TOTAL HORIZONTAL CLEARANCE</td> </tr> </table>	TOP CLEARANCE	+	BOTTOM CLEARANCE	=	TOTAL VERTICAL CLEARANCE	STBD CLEARANCE	+	PORT CLEARANCE	=	TOTAL HORIZONTAL CLEARANCE		<table style="width: 100%;"> <tr> <td>TOP CLEARANCE</td> <td>+</td> <td>BOTTOM CLEARANCE</td> <td>=</td> <td>TOTAL VERTICAL CLEARANCE</td> </tr> <tr> <td>STBD CLEARANCE</td> <td>+</td> <td>PORT CLEARANCE</td> <td>=</td> <td>TOTAL HORIZONTAL CLEARANCE</td> </tr> </table>	TOP CLEARANCE	+	BOTTOM CLEARANCE	=	TOTAL VERTICAL CLEARANCE	STBD CLEARANCE	+	PORT CLEARANCE	=	TOTAL HORIZONTAL CLEARANCE	DOES EITHER CLEARANCE EXCEED MAXIMUM ALLOWABLE LISTED ABOVE? <input type="checkbox"/> Y <input type="checkbox"/> N
TOP CLEARANCE	+	BOTTOM CLEARANCE	=	TOTAL VERTICAL CLEARANCE																				
STBD CLEARANCE	+	PORT CLEARANCE	=	TOTAL HORIZONTAL CLEARANCE																				
TOP CLEARANCE	+	BOTTOM CLEARANCE	=	TOTAL VERTICAL CLEARANCE																				
STBD CLEARANCE	+	PORT CLEARANCE	=	TOTAL HORIZONTAL CLEARANCE																				
TOP  BOTTOM	<table style="width: 100%;"> <tr> <td>TOP CLEARANCE</td> <td>+</td> <td>BOTTOM CLEARANCE</td> <td>=</td> <td>TOTAL VERTICAL CLEARANCE</td> </tr> <tr> <td>STBD CLEARANCE</td> <td>+</td> <td>PORT CLEARANCE</td> <td>=</td> <td>TOTAL HORIZONTAL CLEARANCE</td> </tr> </table>	TOP CLEARANCE	+	BOTTOM CLEARANCE	=	TOTAL VERTICAL CLEARANCE	STBD CLEARANCE	+	PORT CLEARANCE	=	TOTAL HORIZONTAL CLEARANCE	HULL BEARINGS	<table style="width: 100%;"> <tr> <td>TOP CLEARANCE</td> <td>+</td> <td>BOTTOM CLEARANCE</td> <td>=</td> <td>TOTAL VERTICAL CLEARANCE</td> </tr> <tr> <td>STBD CLEARANCE</td> <td>+</td> <td>PORT CLEARANCE</td> <td>=</td> <td>TOTAL HORIZONTAL CLEARANCE</td> </tr> </table>	TOP CLEARANCE	+	BOTTOM CLEARANCE	=	TOTAL VERTICAL CLEARANCE	STBD CLEARANCE	+	PORT CLEARANCE	=	TOTAL HORIZONTAL CLEARANCE	DOES EITHER CLEARANCE EXCEED MAXIMUM ALLOWABLE LISTED ABOVE? <input type="checkbox"/> Y <input type="checkbox"/> N
TOP CLEARANCE	+	BOTTOM CLEARANCE	=	TOTAL VERTICAL CLEARANCE																				
STBD CLEARANCE	+	PORT CLEARANCE	=	TOTAL HORIZONTAL CLEARANCE																				
TOP CLEARANCE	+	BOTTOM CLEARANCE	=	TOTAL VERTICAL CLEARANCE																				
STBD CLEARANCE	+	PORT CLEARANCE	=	TOTAL HORIZONTAL CLEARANCE																				
LIST BOATALTS PENDING:		LIST BOATALTS COMPLETED SINCE LAST REPORT:																						
LIST PENDING CSMPs:																								
INSPECTION TEAM COMMENTS: (ADDITIONAL COMMENTS ON REVERSE) <div style="text-align: right; margin-top: 10px;">             _____              (Signature)           </div>																								
COMMANDING OFFICER/OFFICER IN CHARGE COMMENTS: (COMMENTS REQUIRED ON ALL UNSATISFACTORY ITEMS) (ADDITIONAL COMMENTS ON REVERSE) <div style="text-align: right; margin-top: 10px;">             _____              (Signature)           </div>																								
INTERMEDIATE COMMANDER <div style="text-align: right; margin-top: 10px;">             _____              (Signature)           </div>																								

☐ CONCUR☐ DO NOT CONCUR

(Signature)

## Answers to Lesson #9 Self-Quiz

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Question	Answer
1	Boats less than 65 ft long with inboard main engines Barges Floating cranes
2	Group Section District commander Maintenance and Logistics Command
3	Unit having custody of the boat
4	10 days
5	1. Unsatisfactory items 2. Items deemed necessary, especially those requiring assistance by higher authority
6	Maintenance and Logistics Command (MLC)
7	See completed CG-3022 on the following pages

---

<b>DEPARTMENT OF TRANSPORTATION</b> U. S. COAST GUARD CG-3022 (Rev. 1-98)		<b>BOAT INSPECTION REPORT</b>				DATE  01MAR98	
REPORTING UNIT USCG STATION BARNEGAT, NJ			DECK (TYPE & SIGNATURE) I. M. KNOT			GRADE/RATE E-6/BM	
INTERMEDIATE COMMAND USCG GROUP CAPE MAY, NJ			ENGINEER (TYPE & SIGNATURE) R. W. RITZ			GRADE/RATE E-7/MK	
BOAT NUMBER 41360	TYPE OF BOAT UTB	HIN	OPTIONAL (TYPE & SIGNATURE) M. R. RANDALL			GRADE/RATE E-6/MK	
<b>RECORDS INSPECTION</b>						<b>YES   NO   N/A</b>	
IS BOAT RECORD UP TO DATE AND IAW COMDTINST M9000.6 (SERIES) CHAPTER 90?						X	
IS DEMP UP TO DATE AND PERFORMED IAW APPLICABLE PMS?						X	
IF N/A, IS PERFORMANCE TEST COMPLETED?							
IS PMS UP TO DATE AND IAW APPLICABLE PMS MANUAL?						X	
IS QUARTERLY PMS REPORT SUBMITTED IAW M9000.6 (SERIES) CH 081?						X	
IS SPARE PARTS/ALLOWANCE PROGRAM ACTIVE?						X	
LAST BOTTOM PAINT DATE? 18Feb1997   TYPE OF PAINT USED? Ammeran 635   WAS LAST BOTTOM PAINTING: <input type="checkbox"/> PARTIAL HULL? <input checked="" type="checkbox"/> FULL HULL?							
LAST DRY DOCK AVAILABILITY DATE & LOCATION      15JAN97      USCG GROUP CAPE MAY NJ      BMF							
<b>WATERBORNE INSPECTION (Get Underway and Operate Boat)</b>							
ENGINES	PORT (OR CENTER)	STARBOARD	REDUCTION GEARS	PORT (OR CENTER)	STARBOARD		
MAKE	Cummins	Cummins	MAKE	Twin Disc	Twin Disc		
MODEL	VT903M	VT903M	MODEL	MG-509	MG-509		
SERIAL NUMBER	10572701	10595262	SERIAL NUMBER	3D8696	5BN731		
DATE INSTALLED/ OVERHAULED	02Nov95	04May96	DATE INSTALLED/ OVERHAULED	02Nov95	04May96		
ENGINE HOURS	2554	1546	GEAR HOURS	2554	1546		
C O N D I T I O N	SATISFACTORY	X	X	C O N D I T I O N	SATISFACTORY	X	
	NEED REPAIR				NEED REPAIR		
	NEED OVERHAUL				NEED OVERHAUL		
						<b>YES   NO   N/A</b>	
IS/ARE SHAFT(S) IN ALIGNMENT IAW APPLICABLE MLC STANDARD SPECIFICATION OR MANUFACTURERS RECOMMENDATION?						X	
IS COOLING SYSTEM MAINTAINED IAW COMDTINST M9000.6 (SERIES) CHAPTER 233?						X	
ARE ALL FLEX HOSES MAINTAINED IAW COMDTINST M9000.6 (SERIES) CHAPTER 505?						X	
ARE WATER TIGHT BOUNDARIES TESTED & INSPECTED IAW NSTM 9880?						X	
ARE HOISTING PADS TESTED AND INSPECTED IAW COMDTINST M9000.6 (SERIES) CHAPTER 583?						X	
ARE LIFE RING LIGHTS & LIFE RINGS INSPECTED IAW COMDTINST M10470.10 (SERIES)?						X	
IS BOAT OUTFIT INSPECTED AND MAINTAINED IAW APPLICABLE TYPE MANUAL OR DISTRICT INSTRUCTION?						X	
IS INSIDE OF HULL INSPECTED IAW COMDTINST M9000.6 (SERIES) CHAPTER 079?						X	
DO CONTROLS OPERATE IAW APPLICABLE PMS OR MANUFACTURERS INSTRUCTIONS?						X	
ARE INSTRUMENTS RED LINED AND OPERATING IAW M9000 (SERIES) CHAPTER 233?						X	
DATE OF LAST LIFERAFT INSPECTION PERFORMED IAW M10470.10 (SERIES)?						15Feb97	
DATE OF LAST FUEL TANK CLEANING & INSPECTION PERFORMED IAW NSTM 541?						12Feb97	
DATE OF LAST COMPASS DEVIATION PERFORMED IAW NSTM 420?						15Aug97	
<b>INSPECTION WHILE HAULED OUT OF WATER</b>							
Check and Record Rudder Bushing Clearance (Maximum allowable clearance 1" and 2" rudder stock .050" and 3" stock .060")							
PORT (OR CENTER) CLEARANCE		.046		<input checked="" type="checkbox"/> SATISFACTORY	<input type="checkbox"/> UNSATISFACTORY		
STARBOARD CLEARANCE		.033		<input checked="" type="checkbox"/> SATISFACTORY	<input type="checkbox"/> UNSATISFACTORY		
Remove Propeller, Check and Record Propeller Shaft Runout at After end of Shaft (Maximum allowable runout .004")							
PORT (OR CENTER) SHAFT		.003		<input checked="" type="checkbox"/> SATISFACTORY	<input type="checkbox"/> UNSATISFACTORY		
STARBOARD SHAFT		.004		<input checked="" type="checkbox"/> SATISFACTORY	<input type="checkbox"/> UNSATISFACTORY		
				SAT	UNSAT		
INSPECT OUTSIDE OF ENTIRE HULL (LIST ALL DAMAGES & DISCREPANCIES BELOW)				X	PROPELLER WEIGHT EXCLUDING OUTBOARD & I/O		
INSPECT PROPELLER(S) (LIST ALL DAMAGE & DISCREPANCIES BELOW)				X			
DAMAGE & DISCREPANCIES: (ADDITIONAL COMMENTS ON REVERSE)							
None							

PREVIOUS EDITION IS OBSOLETE

## Check and Record Strut and Hull Cutless Bearing Clearances:

Maximum Allowable Clearances -- 1" Shaft diameter - .070"  
 1 - 1/2" Shaft diameter - .081"  
 1 - 3/4" Shaft diameter - .086"  
 2" Shaft diameter - .091"

PORT (OR CENTER)				STARBOARD			
.015 TOP	.015 TOP CLEARANCE	.010 BOTTOM CLEARANCE	.025 TOTAL VERTICAL CLEARANCE	.010 TOP	.010 TOP CLEARANCE	.010 BOTTOM CLEARANCE	.020 TOTAL VERTICAL CLEARANCE
.010 PORT	+ .010 STBD		=	.025 PORT	+ .010 STBD		=
		.010 STBD CLEARANCE				.025 PORT CLEARANCE	
.025 BOTTOM	+ .010 PORT		=	.010 BOTTOM	+ .025 PORT		=
		.010 STBD CLEARANCE				.025 PORT CLEARANCE	
DOES EITHER CLEARANCE EXCEED MAXIMUM ALLOWABLE LISTED ABOVE? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N				DOES EITHER CLEARANCE EXCEED MAXIMUM ALLOWABLE LISTED ABOVE? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N			

PORT (OR CENTER)				STARBOARD			
.010 TOP	.010 TOP CLEARANCE	.004 BOTTOM CLEARANCE	.014 TOTAL VERTICAL CLEARANCE	.006 TOP	.006 TOP CLEARANCE	.004 BOTTOM CLEARANCE	.010 TOTAL VERTICAL CLEARANCE
.006 PORT	+ .006 STBD		=	.006 PORT	+ .006 STBD		=
		.006 STBD CLEARANCE				.006 PORT CLEARANCE	
.004 BOTTOM	+ .006 PORT		=	.004 BOTTOM	+ .006 PORT		=
		.006 STBD CLEARANCE				.006 PORT CLEARANCE	
DOES EITHER CLEARANCE EXCEED MAXIMUM ALLOWABLE LISTED ABOVE? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N				DOES EITHER CLEARANCE EXCEED MAXIMUM ALLOWABLE LISTED ABOVE? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N			

## LIST BOATALTS PENDING:

41UTB (A)-A-93

## LIST BOATALTS COMPLETED SINCE LAST REPORT:

None

## LIST PENDING CSMPs:

None

## INSPECTION TEAM COMMENTS: (ADDITIONAL COMMENTS ON REVERSE)

Major overhauls were completed on the port and starboard main engines fuel pumps and turbochargers. Stainless steel mufflers were installed on both main engines. The underwater body paint system "Ammeran 635 Organitin" had no damage. Only one boat alteration (41UTB (A)-A-93) pends. The inspection team found no discrepancies.

(Signature)

## COMMANDING OFFICER/OFFICER IN CHARGE COMMENTS: (COMMENTS REQUIRED ON ALL UNSATISFACTORY ITEMS) (ADDITIONAL COMMENTS ON REVERSE)

(Signature)

## INTERMEDIATE COMMANDER

(Signature)

☐ CONCUR☐ DO NOT CONCUR

## Lesson 10

### ORAL EXAMINATION BOARD MEMBER

#### Overview

---

##### Reading Assignment

This lesson is based on the following reading assignments:

- ◆ Boat Crew Training Manual, COMDTINST M16114.9 (series)
  - ◆ Cutter Training and Qualification Manual, COMDTINST M3502.4 (series)
    - Chapter 5 Personnel Qualification Standards (PQS)
- 

##### Objective

This lesson will teach you how to:

- ◆ Serve as an oral board member.
- 

##### Lesson Objectives

To successfully complete the objective, you must be able to:

- ◆ **IDENTIFY** the qualities of the boat crewman which the command examines and attests to during the certification phase of the boat crew training process.
  - ◆ **STATE** who will review the Boat Crew Examining Board's recommendations.
  - ◆ **DETERMINE** the primary function of the Boat Crew Examining Board.
  - ◆ **DETERMINE** the responsibility of the Boat Crew Examining Board.
  - ◆ **STATE** who the members are on the Boat Crew Examining Board.
  - ◆ **DETERMINE** the duties of the Boat Crew Examining Board.
  - ◆ **STATE** the member from the Boat Crew Examining Board who will conduct the underway check ride.
  - ◆ **IDENTIFY** the skills and attributes to be observed during the check ride.
  - ◆ **DESCRIBE** the type of questions used during the board interview.
  - ◆ **STATE** what information is required when a written report is submitted to the unit commander after the board interview is completed.
  - ◆ **STATE** what additional information must be included in a written report if the candidate is not recommended.
-

## Overview

---

### Lesson Objectives (Continued)

- ◆ **IDENTIFY** the specific required topics the Oral Boat Crew Examining Board can cover.
- ◆ **LIST** the qualities an Oral Examining Board will consider adequate for standing a watch under the Personnel Qualification Standards (PQS).
- ◆ **STATE** the composition of an Oral Examining Board under the PQS system.
- ◆ **STATE** the documentation required from the Oral Examining Board under the PQS system after a candidate successfully completes the board.

---

### Performance Qualification

This lesson covers the following performance qualification for BM1 from the Enlisted Qualification Manual:

- ◆ TRAINING 6.02
-

## Lesson #10 Self-Quiz

---

1. Place an X next to the qualities of the boat crewman being attested to during the certification phase.

\_\_\_\_\_ Maturity  
\_\_\_\_\_ Judgment  
\_\_\_\_\_ Appearance in uniform  
\_\_\_\_\_ Professional qualifications

2. Who will review the Boat Crew Examining Board's recommendations?

3. What is the primary function of the Boat Crew Examining Board?

4. What is the responsibility of the Boat Crew Examining Board?

5. Describe the Boat Crew Examining Board's membership.

6. List the duties of the Boat Crew Examining Board.

7. Who conducts the underway check rides for each of the following crew positions?

Crewman \_\_\_\_\_  
Coxswain \_\_\_\_\_  
Engineer \_\_\_\_\_  
Surfman \_\_\_\_\_

---

## Lesson #10 Self-Quiz

---

8. Match the skills and attributes observed during the underway check ride in column A with the proper crew position in column B. Each crew position may be used more than once.

### Column A

- \_\_\_\_\_ 1. Policies
- \_\_\_\_\_ 2. Navigation
- \_\_\_\_\_ 3. Judgment
- \_\_\_\_\_ 4. Leadership
- \_\_\_\_\_ 5. Confidence
- \_\_\_\_\_ 6. Boat handling
- \_\_\_\_\_ 7. Watch standing
- \_\_\_\_\_ 8. Assistance drills
- \_\_\_\_\_ 9. Decision making
- \_\_\_\_\_ 10. Surf rescue drills
- \_\_\_\_\_ 11. Crew coordination
- \_\_\_\_\_ 12. Boat familiarization
- \_\_\_\_\_ 13. Surf station keeping
- \_\_\_\_\_ 14. Area familiarization
- \_\_\_\_\_ 15. Shut down sequence
- \_\_\_\_\_ 16. Emergency procedures
- \_\_\_\_\_ 17. Transiting a breaking bar
- \_\_\_\_\_ 18. Pre-start checks and adjustments
- \_\_\_\_\_ 19. Boat engineering systems familiarization
- \_\_\_\_\_ 20. Required preventive maintenance for boat type
- \_\_\_\_\_ 21. Knowledge of general engineering specifications of the boat type
- \_\_\_\_\_ 22. Monitoring of all engineering casualties and correction procedures

### Column B

- a. Crewman
- b. Engineer
- c. Coxswain
- d. Surfman

## Lesson #10 Self-Quiz

---

9. Describe the type of questions used during the board interview.
10. Once the check ride and board interview are completed, the board will give a written report to the unit commander with what information?
11. If a boat crew candidate is not recommended by the board, what additional information must be included in the written report?
12. Match the subjects covered during an oral examination in column A with the proper crew position in column B. Each crew position may be used more than once.

### Column A

- \_\_\_\_\_ 1. Surfmanship
- \_\_\_\_\_ 2. Local knowledge
- \_\_\_\_\_ 3. Boat type technical data
- \_\_\_\_\_ 4. Seamanship and navigation
- \_\_\_\_\_ 5. SAR policies and procedures
- \_\_\_\_\_ 6. Boat type casualties and repairs
- \_\_\_\_\_ 7. Firefighting and damage control
- \_\_\_\_\_ 8. Knowledge of bar and inlet conditions
- \_\_\_\_\_ 9. Detailed knowledge of the unit's OPAREA
- \_\_\_\_\_ 10. Policies and procedures for SAR, ELT, SRA, PES, MER, and RBS
- \_\_\_\_\_ 11. Boat type, fuel, electrical, hydraulic steering, and cooling systems
- \_\_\_\_\_ 12. Maturity, judgment, and willingness to accept duties and responsibilities

### Column B

- a. Crewman
- b. Engineer
- c. Coxswain
- d. Surfman

13. What are the qualities the oral examining board considers adequate for PQS watch-station qualification?
14. Under the PQS qualification system, what is the MINIMUM number of members on the Oral Examining Board?
15. What documentation does the board or training officer prepare upon a candidate's successful completion of an examining board for PQS?

## Answers to Lesson #10 Self-Quiz

---

Question	Answer
1	Professional qualifications Maturity Judgement
2	Unit commander
3	Recommend personnel for certification to boat crew positions
4	Administration of comprehensive check rides and personal interviews and to serve as the quality control source for unit boat crews.
5	One experienced coxswain, one experienced boat engineer, and if applicable a surfman. The senior certified member will be the chairman of the board.
6	Plan underway check rides Conduct underway check rides Evaluate prospective boat crew members
7	Crewman: certified coxswain Coxswain: experienced, certified coxswain Engineer: certified engineer Surfman: experienced, certified surfman

---

## Answers to Lesson #10 Self-Quiz

---

### Question

### Answer

8

1. c
2. a, c
3. c
4. c
5. c
6. a, c, d
7. a
8. c
9. c
10. d
11. c
12. a
13. d
14. a, b, c,
15. b
16. a, c
17. d
18. b
19. b
20. b
21. b
22. b

9

Questions which will evaluate the prospective member in terms of leadership ability, judgment, and maturity

10

Favorable or unfavorable recommendation  
Copy of trainee's check ride  
Copy of the interview evaluation

11

Reason for unfavorable recommendation  
What areas of performance unacceptable  
Suggestions for increased training or experience

---

## Answers to Lesson #10 Self-Quiz

---

Question	Answer
12	<ol style="list-style-type: none"><li>1. d</li><li>2. a, c, d</li><li>3. a, c</li><li>4. a, c</li><li>5. a, c</li><li>6. b</li><li>7. b</li><li>8. d</li><li>9. c</li><li>10. c</li><li>11. b</li><li>12. c</li></ol>
13	Knowledge, skill, and temperament
14	Two
15	A letter recommending qualification

---

## Lesson 11

### INSTRUCTOR BOAT COXSWAIN

#### Overview

---

##### Reading Assignment

This lesson is based on the following reading assignments:

- ◆ Boat Crew Training Manual, COMDTINST M16114.9 (series)
  - ◆ Boat Crew Qualification Guide, COMDTINST M16114.11 (series)
- 

##### Objective

This lesson will teach you how to:

- ◆ Instruct a boat coxswain candidate.
- 

##### Lesson Objectives

To successfully complete the objective, you must be able to:

- ◆ **DETERMINE** the system on which this program is based.
  - ◆ **DETERMINE** the start of the certification phase.
  - ◆ **STATE** who is responsible for deadlines and training objectives.
  - ◆ **DETERMINE** who is responsible for the initial training of the boat crew candidate.
  - ◆ **LIST** the qualities an instructor must demonstrate before being selected.
  - ◆ **DETERMINE** the instructor's source for detailed instructions.
  - ◆ **STATE** who assigns an instructor.
  - ◆ **STATE** how long a trainee practices.
  - ◆ **DETERMINE** the section of the training guide given to the trainee.
  - ◆ **DETERMINE** responsibility for trainee record maintenance.
  - ◆ **STATE** the number of duties an instructor has.
  - ◆ **LIST** the ten instructor guidance procedural steps.
  - ◆ **STATE** how to detect and correct bad work habits and incorrect procedures.
  - ◆ **DETERMINE** when a task is signed off as completed.
  - ◆ **STATE** to whom the instructor makes a positive recommendation.
-

## Overview

---

### **Performance Qualification**

This lesson covers the following performance qualification for BM1 from the Enlisted Qualification Manual:

- ◆ TRAINING 6.03
-

## **Lesson #11 Self-Quiz**

---

1. What system is this program based on?
  2. When can the certification phase start?
  3. Who is responsible for deadlines and training objectives?
  4. Who is responsible for the initial training of the boat crew candidate?
  5. What qualities must an instructor demonstrate before being selected?
  6. Where are detailed instructions for instructors located?
  7. After consultation with the training officer, who assigns the instructor?
  8. When can a trainee stop practicing a supervised task?
  9. What section of the trainee's guide is given to the trainee?
  10. Who is responsible for the trainee record maintenance?
  11. How many duties does the instructor have?
  12. List the ten instructor guidance procedural steps.
  13. How does an instructor detect and correct bad work habits and incorrect procedures?
  14. When should an instructor sign off a task as completed?
  15. The instructor makes a positive recommendation to the \_\_\_\_\_.
-

**NO TEXT THIS PAGE**

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## Answers to Lesson #11 Self-Quiz

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Question	Answer
1	A master and apprenticeship system
2	When the appropriate training guide is completely signed off
3	Unit training officer
4	Instructor
5	Judgement, patience, and maturity
6	Each qualification guide
7	Unit commander
8	When the instructor is confident that the trainee is able to meet task standards unsupervised
9	Reading assignments
10	Instructor
11	Five
12	<ol style="list-style-type: none"><li>1. Give chapter III to the trainee</li><li>2. Assign the task</li><li>3. Confirm completion of the reading assignment</li><li>4. Demonstrate the task</li><li>5. Walk the trainee through the task</li><li>6. Monitor the trainee's practice</li><li>7. Verify the trainee's performance</li><li>8. Sign off the task</li><li>9. Keep an accurate record of the training</li><li>10. Inform the unit command when the manual is completed</li></ol>
13	By maintaining open communications with the trainee
14	Not until instructor is satisfied that the trainee is fully capable of performing the task unsupervised
15	Boat crew examining board

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## Appendix A

### PAMPHLET REVIEW QUIZ

1. Who is responsible for the custodial control of property within a specified custodial area?
  - A. Property officer
  - B. Property custodian
  - C. Operations officer
  - D. Ordnance officer
2. What is/are the primary form(s) used with the ARMS program?
  - A. SF-344 only
  - B. Requisition Log only
  - C. SF-344 and Surf Requisition Log
  - D. Requisition Log and Surf Requisition Log
3. Information that must appear on a Procurement Request includes all of the following EXCEPT \_\_\_\_\_.
  - A. accounting data
  - B. type of request
  - C. approval signature
  - D. purchase description
4. If the amount of purchase exceeds the authorized limitations of the SF-44, you would \_\_\_\_\_.
  - A. make other purchase arrangements
  - B. use two or more SF-44s on different days
  - C. split the purchase and use two or more SF-44s on the same day
  - D. exceed the dollar limitation if supplies or services cannot otherwise be readily located
5. All IMPAC cardholders are considered \_\_\_\_\_ officials.
  - A. certifying
  - B. approving
  - C. contracting
  - D. procurement
6. The Abstract of Operations Boat Report is prepared \_\_\_\_\_.
  - A. monthly
  - B. quarterly
  - C. semiannually
  - D. annually

7. Testing shall be performed on all power-driven cranes and booms when \_\_\_\_\_.
  - A. second level inspection is performed
  - B. fourth level inspection is performed
  - C. the engineering officer schedules the test
  - D. the weapons officer schedules the test
8. What percent of the normal hoisting load weight is used when you conduct a load test on boat hoisting equipment?
  - A. 100
  - B. 125
  - C. 150
  - D. 175
9. The interval between boat inspections is established by the \_\_\_\_\_.
  - A. officer-in-charge
  - B. MLC commander
  - C. group commander
  - D. district commander
10. Who reviews the recommendations from the Boat Crew Examining Board?
  - A. Training officer
  - B. Executive officer
  - C. Officer-in-charge
  - D. Officer of the day
11. Who is responsible for interviewing prospective boat coxswain trainees and instructors?
  - A. Executive officer
  - B. Commanding officer
  - C. Officer of the day
  - D. Unit training officer
12. Who is responsible for publishing the Quarterly Training Plan?
  - A. Commanding officer
  - B. Training officer
  - C. Department head
  - D. Training board

## Appendix B

### PAMPHLET REVIEW QUIZ – ANSWER KEY

QUESTION	ANSWER	REFERENCE	QUESTION	ANSWER	REFERENCE
1.	B	1-1	11.	D	11-1
2.	C	2-1	12.	B	12-1
3.	B	3-1			
4.	C	4-1			
5.	D	5-1			
6.	B	6-1			
7.	A	7-1			
8.	C	8-1			
9.	B	9-1			
10.	C	10-1			

## Request for Feedback on BM1 Course Pamphlet

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### Suggestions and Corrections

Please note your suggestions, corrections, and comments below.

Page	Location on Page	What Correction is Needed

### Your Comments

If you were writing this pamphlet, what improvements would you make? What was good about it? What did you not like about it? Please be specific in your comments/suggestions.

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### To Contact You

Please provide the following so that we can contact you if needed.

Name	Unit	Phone
		(    )

### Mail, Fax, or Call

Please mail, fax, or call your information to:

Commanding Officer (t-nct)                      PHONE: (757) 856-2427  
U.S. Coast Guard Training Center Yorktown      FAX: (757) 856-2342  
Yorktown VA 23690-5000

ATTN: BM Subject Matter Specialist

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